

Comparative Analysis
of GCC Incentives and Support Across

INDIAN STATES



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Executive Summary

India's Global Capability Center ecosystem has reached a critical inflection point. With over 1,800 GCCs generating \$64.6 billion in revenue as of 2024 and projections exceeding \$110 billion by 2030, the market dynamics have fundamentally shifted.

This evolution hasn't unfolded uniformly across India's geography. State governments have recognized that GCCs represent high-value economic multipliers, premium employment, sustained foreign investment, knowledge transfer, and infrastructure catalysis, and are competing through increasingly sophisticated, differentiated policy frameworks. The competition has intensified dramatically in 2024-2025, with multiple states launching dedicated GCC policies within months of each other.

Understanding state-level variations is no longer merely useful for site selection; it's essential for optimizing operational economics, accessing talent pools, and ensuring long-term competitiveness. The difference between selecting the right jurisdiction and the wrong one can amount to tens of millions in operational costs over five years, along with significant variations in talent availability, regulatory friction, and growth trajectory.

This analysis provides a deep, granular deconstruction of incentive structures, regulatory approaches, infrastructure readiness, and strategic positioning across India's major GCC destinations. It's designed for organizations evaluating establishment decisions, expansion scenarios, or multi-location strategies requiring detailed comparative intelligence.



Market Context and Strategic Significance

The Fundamental Shift in GCC Value Proposition

The characterization of GCCs as "back-office operations" is obsolete and misleading. Today's GCCs function as strategic assets for parent organizations, with nearly 90% handling multifunctional operations spanning technology development, operations excellence, and product engineering. Engineering-focused GCCs are growing 1.3 times faster than overall GCC growth, signaling irreversible movement toward high-value activities.

This shift creates fundamentally different location requirements. Legacy considerations, basic infrastructure, low-cost labor, and generic tax breaks remain necessary but insufficient. Modern GCCs require:

- 01** **Specialized talent ecosystems:**
Engineers with domain expertise in AI, cloud architecture, cybersecurity, blockchain, quantum computing, and emerging technologies
- 02** **Innovation infrastructure:**
Access to R&D facilities, prototyping centers, testing labs, and academic research partnerships
- 03** **Regulatory sophistication:**
Governments capable of understanding complex operational requirements and adapting policies accordingly
- 04** **Quality of life factors:**
Urban amenities, cultural vibrancy, education systems, and lifestyle attributes that attract and retain global talent



Federal Policy Framework: The Backdrop

The central government is developing an umbrella policy framework emphasizing tier-2 and tier-3 city expansion, talent development in frontier technologies (generative AI, healthcare intelligence, financial services), and regulatory streamlining. But ample work is still required to match the pace of the growing number of GCCs in India. Key federal-level initiatives include:

- 01 SEZ Benefits:** 100% tax exemption on export profits for the first 5 years, 50% for the next 5 years, and an additional 50% on reinvested profits for another 5 years
- 02 Software Technology Parks of India (STPI) Scheme:** Duty-free import of capital goods, exemption from service tax, simplified regulatory compliance
- 03 Skill India Mission:** National-level talent development programs in emerging technologies
- 04 Startup India Integration:** Connecting GCCs with domestic startup ecosystems for innovation partnerships

However, the real differentiation and operational impact occur at the state level, where granular incentive design, execution capability, and institutional support determine actual outcomes.



Competitive Dynamics: Global and Domestic

India faces increasing competition from Southeast Asia for GCC investments. These regions offer:

- Lower real estate costs in some markets
- Favorable time zones for European operations
- Improving technical education systems
- Competitive tax regimes

India's enduring advantages remain:

Scale:
No other geography can match India's talent pool depth over 5 million technical graduates annually

Maturity:
Two decades of GCC operational experience creating institutional knowledge unavailable elsewhere

Diversity:
Capability across virtually every industry sector and functional domain

Innovation velocity:

Rapid adoption of emerging technologies and willingness to experiment

Domestically, competition between states has intensified dramatically. Karnataka's first-mover advantage in Bengaluru is being challenged by aggressive policies from Uttar Pradesh, Tamil Nadu, Telangana, and newer entrants like Madhya Pradesh and Gujarat. This competition benefits multinational corporations through improved incentive packages, infrastructure investment, and regulatory responsiveness.



Detailed State-by-State Analysis

Karnataka

The Incumbent Leader with
Ecosystem Depth

Policy Framework

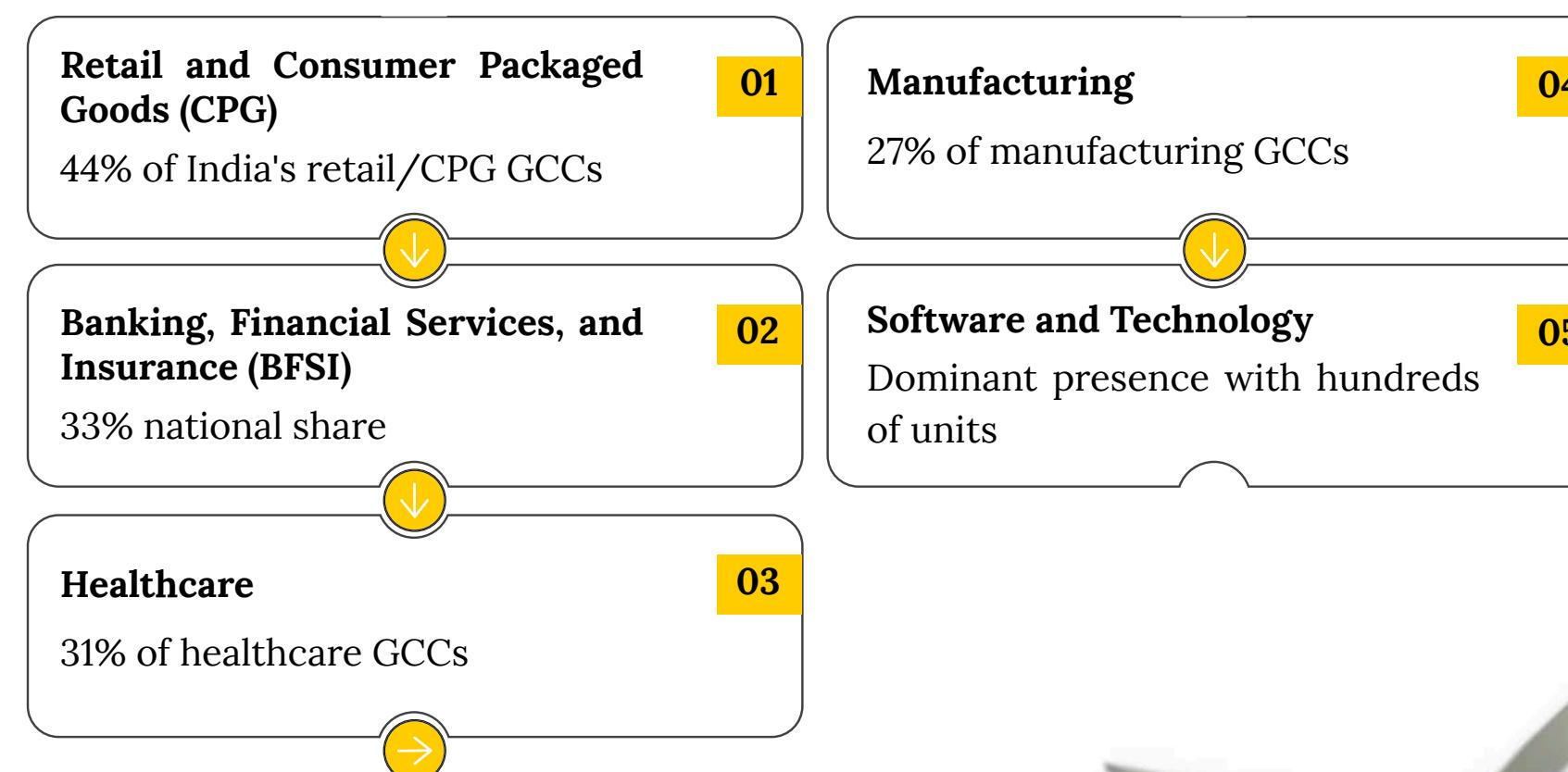
Karnataka Global Capability Centre Policy 2024-2029: India's first dedicated GCC policy, launched November 19, 2024.



Strategic Positioning and Market Leadership

Karnataka, particularly Bengaluru, represents India's most mature GCC ecosystem. The state hosts 650-875 GCCs (estimates vary by source) and maintains 30-35% of India's total GCC workforce, approximately 500,000 professionals. This concentration creates network effects impossible to replicate quickly elsewhere.

The state's sectoral distribution demonstrates sophisticated diversification:



Karnataka ranked first in NITI Aayog's India Innovation Index 2021 and maintains this leadership through continuous policy evolution rather than resting on legacy advantages.

Target Metrics (2024-2029)

500 New GCCs

Bringing total to 1,000 by 2029

350,000 New Jobs

Representing roughly 70% growth from the current base

\$50 Billion Economic Output

More than doubling the current GCC contribution



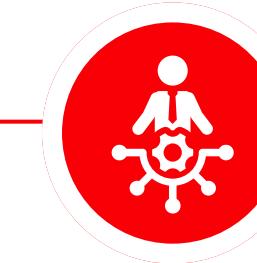
Financial Incentives: Comprehensive and Multi-Dimensional

Talent Development and Workforce Incentives



Internship Support Program

- **50% reimbursement** of internship stipends
- Targeting **100,000 student internships** over the policy period
- Designed to create a direct pipeline from educational institutions to GCC employment
- Focus on emerging technologies and domain-specific skills



Skilling Grants

- **20% reimbursement** on skilling expenses
- Applicable to graduates and diploma holders from Karnataka institutions
- Covers training in AI, machine learning, cloud computing, cybersecurity, data analytics, and blockchain
- Encourages continuous upskilling of the existing workforce



Global Leadership Development

- Financial assistance for leadership training programs
- Supports the development of C-suite and senior management talent within GCCs
- Addresses the critical gap in the leadership pipeline for Indian operations



Innovation Infrastructure Funding

Innovation Labs and Centers of Excellence

- Up to 40% funding for establishing innovation labs
- 100% reimbursement for startups using GCC labs (capped at ₹40 lakh per startup)
- Encourages GCCs to build R&D facilities accessible to the broader ecosystem
- Promotes technology transfer and collaboration

Intellectual Property Incentives

- 50% reimbursement of patent filing fees
- Higher percentages for units in "Beyond Bengaluru" locations
- Covers both domestic and international patent filings
- Includes trademark and certification fee reimbursements

Innovation Challenge Funding

- Up to ₹1.5 crore in government funding for GCCs solving public service challenges
- Creates a mechanism for GCCs to contribute to civic innovation while accessing funding
- Addresses problems in healthcare, education, transportation, and governance.

C. Capital Investment and Infrastructure Support

Capital Investment Subsidy

- Up to 25% subsidy on capital investments
- Encourages technology upgrades and R&D-focused spending
- Applicable to equipment, computing infrastructure, and lab facilities

Infrastructure Development Grants

- Provision for infrastructure development grants **up to ₹50 million**
- Supports the establishment of high-quality physical and digital infrastructure
- Covers building improvements, connectivity enhancement, and specialized facilities

"Beyond Bengaluru" Geographic Expansion Incentives

Karnataka explicitly addresses Bengaluru's infrastructure saturation through targeted incentives for tier-2/3 cities:

Target Cities

- **Mysuru:** Electronics Manufacturing Cluster (EMC), part of the KWIN City initiative
- **Hubballi-Dharwad-Belagavi:** Focused on fintech and cybersecurity
- **Mangaluru:** Emerging as a fintech hub
- **Tumakuru:** Early-stage startup focus
- **Kalaburagi, Shivamogga:** Secondary expansion cities

Specific "Beyond Bengaluru" Benefits

- **Beyond Bengaluru Cluster Seed Fund:** Financial backing for early-stage operations
- **5-year electricity duty exemption:** Transition from commercial to industrial power tariffs, representing a 15-20% reduction in power costs
- **Property tax reimbursement:** Additional fiscal support for operational costs
- **Enhanced incentive multipliers:** Many standard incentives receive 1.5-2x multipliers in these locations
- **Early mover advantages:** First GCCs in these clusters receive additional benefits

Operational and Event Support



Event Hosting Support

- **One-third reimbursement** of event hosting costs (up to ₹25 lakh)
- Encourages GCCs to host conferences, hackathons, and industry gatherings
- Builds Karnataka's reputation as an innovation hub



Collaboration Platform

- Matchmaking service for industry-academia partnerships
- Facilitated connections with IIT Bangalore, IIS Bangalore, NIMHANS, and other premier institutions
- Reduces transaction costs for research collaborations

F. Nano GCC Special Provisions

Recognizing the emergence of specialized, small-scale GCCs:



Flexible operations:
5-50 employees qualify



No minimum investment thresholds:
Removes barriers to entry



No minimum employment requirements:
Focuses on value rather than headcount



Streamlined compliance:
Reduced reporting and administrative requirements

Operational Support Infrastructure

Single Point of Contact (SPOC) System

- Dedicated SPOC assigned to each GCC
- Serves as an interface between the company and all government departments
- Reduces coordination friction across multiple agencies
- Personalized problem-solving for operational challenges

Single-Window Clearance Mechanism

- **Online processing** of all operational approvals
- **45-day maximum** turnaround time commitment
- Covers licenses, permits, clearances, registrations
- Digitalized tracking system for transparency

Innovation Districts Development

Three planned Global Innovation Districts:

1. Bengaluru Innovation District

- Building on existing ecosystem concentration
- Focus on AI, deep tech, and healthcare technology
- Integration with existing startup infrastructure (T-Hub partnerships, academic institutions)

2. Mysuru Innovation District

- Centered around Electronics Manufacturing Cluster
- Part of the broader KWIN (Knowledge, Wellbeing, and Innovation) City initiative
- INNOVERSE Campus for deep tech innovations
- Emphasis on hardware-software integration

3. Belagavi Innovation District

- Geographic diversification to North Karnataka
- Leverages existing educational institutions
- Focus on manufacturing-tech integration

Nipuna Karnataka: Comprehensive Skilling Initiative



Scale and Funding

- ₹300 crore total budget (₹100 crore first year, ₹200 crore from CSR funds)
- Target: 100,000 professionals trained by 2025
- 70% placement rate commitment
- 1,00,000 trainees in the first year through partner MoUs



Strategic Partnerships Five MoUs with global technology leaders:

- Microsoft:** Train 10,000 youth annually in deep tech
- Intel:** Train 20,000 in AI programs
- IBM:** Train 50,000 in AI and cloud services
- Accenture:** Train 10,000 in cybersecurity
- BFSI Consortium:** Train 10,000 in financial services technology

Launched September 2024 with transformative ambition:



Curriculum Focus

- Artificial Intelligence and Machine Learning
- Blockchain and Distributed Systems
- Cloud Architecture (AWS, Azure, Google Cloud)
- Cybersecurity and Information Security
- Data Analytics and Business Intelligence
- Internet of Things (IoT)
- Quantum Computing (introductory)
- Digital literacy and soft skills



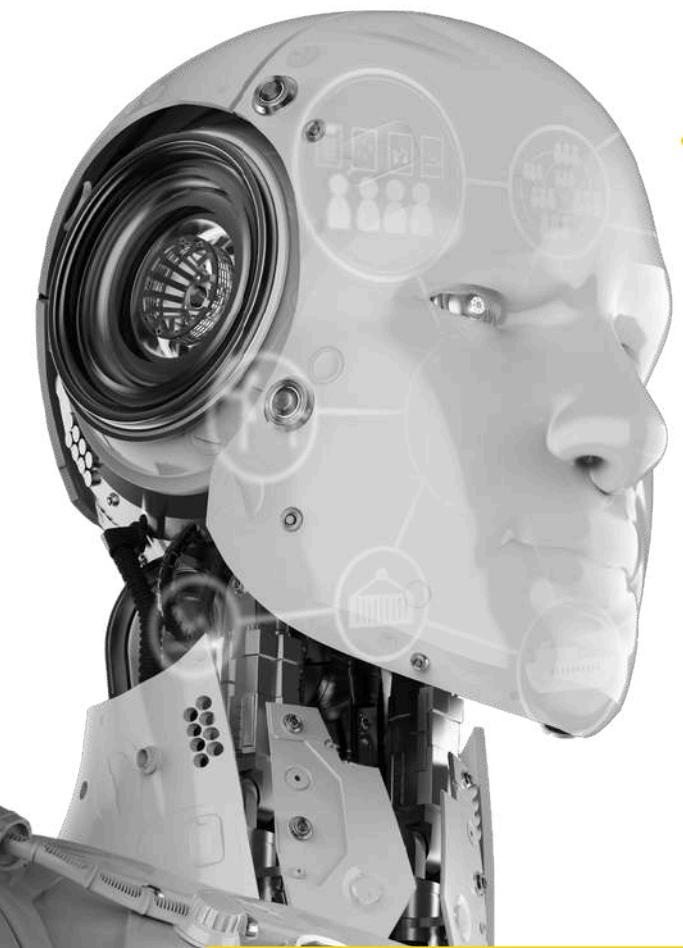
Target Demographics

- Students in the final year of engineering/technical programs
- Recent graduates (within 2 years of graduation)
- Employed individuals seeking skill upgrades
- Career changers from non-technical backgrounds



Scholarship Programs

- Scholarships for economically disadvantaged students
- Special focus on rural backgrounds
- Support for women returning to the workforce
- SC/ST/OBC prioritization category



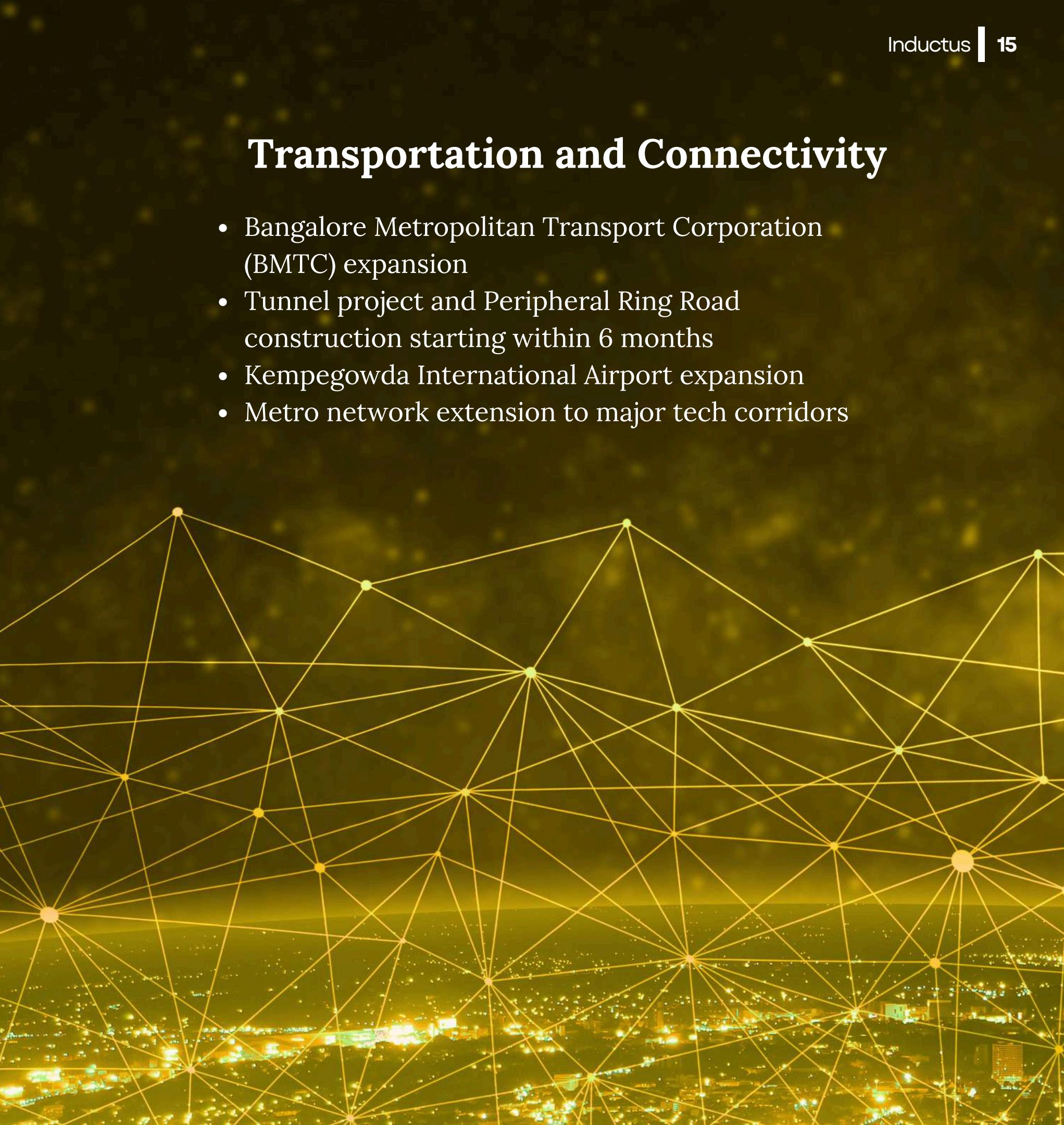
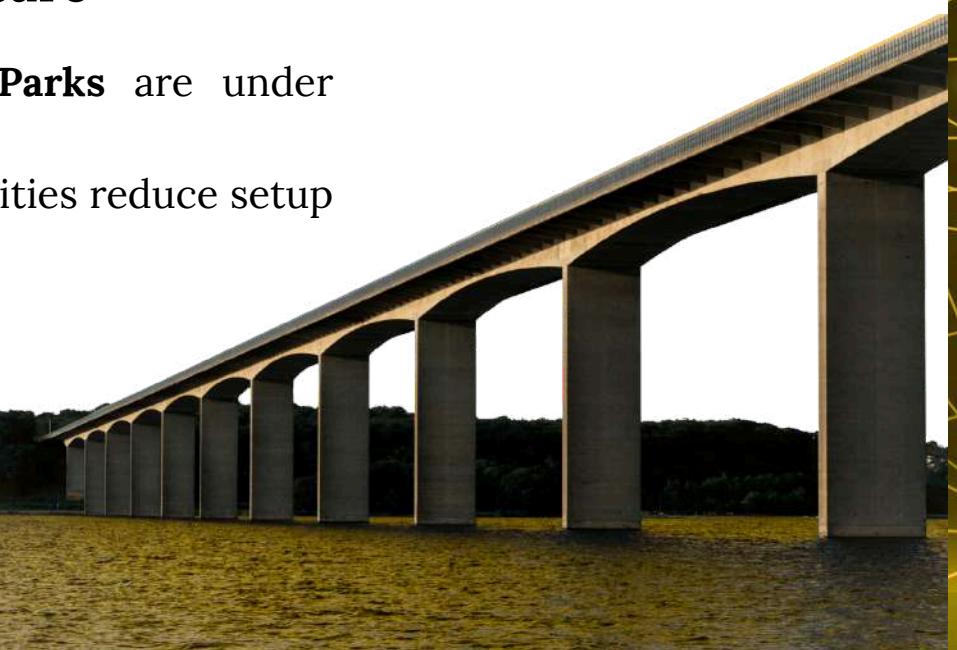
E. Infrastructure Readiness

Digital Infrastructure

- 5G rollout in all major business districts by 2025
- AI-driven urban solutions deployment
- Smart City Mission implementation in Bengaluru
- High-speed fiber connectivity statewide
- Data center clusters in multiple cities

Physical Infrastructure

- **Three dedicated GCC Parks** are under development
- Plug-and-play office facilities reduce setup time to 30-60 days
- Co-working and collaborative workspace networks
- Specialized lab facilities for hardware prototyping



Transportation and Connectivity

- Bangalore Metropolitan Transport Corporation (BMTC) expansion
- Tunnel project and Peripheral Ring Road construction starting within 6 months
- Kempegowda International Airport expansion
- Metro network extension to major tech corridors

Assessment Karnataka's

Enduring Advantages and Emerging Challenges

Strengths

- Ecosystem Maturity:** Two decades of GCC concentration create irreplaceable institutional knowledge, service provider specialization, and talent mobility
- Talent Depth:** Largest concentration of experienced GCC professionals in India; talent poaching between companies creates rapid skill transfer
- Sectoral Diversity:** Strong presence across virtually all industries rather than concentration in a few sectors
- Policy Sophistication:** First dedicated GCC policy demonstrates understanding of sector nuances; continuous stakeholder engagement
- Innovation Infrastructure:** Unmatched concentration of R&D facilities, academic institutions, and innovation centers

Challenges

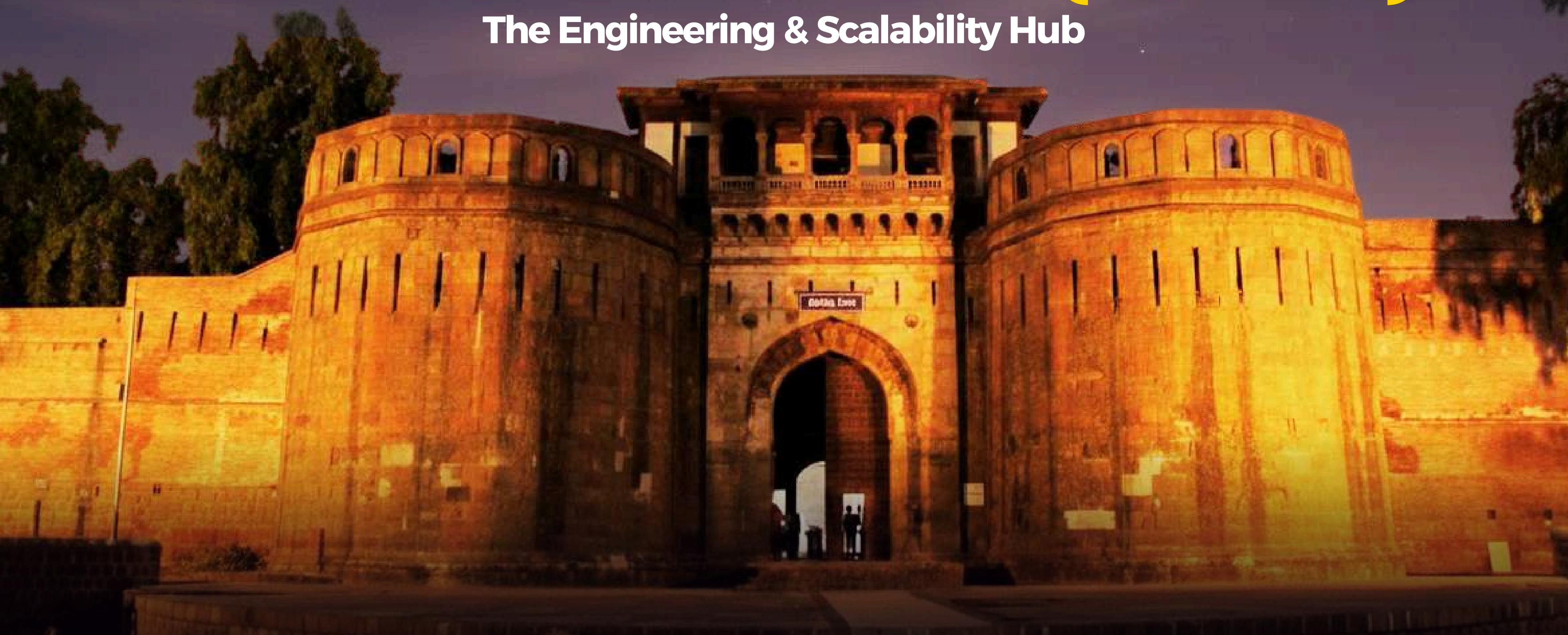
- Infrastructure Saturation:** Bengaluru's traffic congestion, real estate costs, and urban strain create operational friction
- Cost Escalation:** Salary expectations 20-30% higher than tier-2 cities; real estate 2-3x more expensive
- Talent War Intensity:** High attrition rates (18-22% annually) due to excessive poaching
- "Beyond Bengaluru" Execution Risk:** Tier-2 cities lack supporting ecosystems; may struggle to attract talent despite incentives

Optimal For

- Innovation-driven R&D centers require mature ecosystems
- Large-scale operations (500+ employees) needing deep talent pools
- Multi-functional GCCs spanning engineering, operations, and business functions
- Organizations prioritizing ecosystem access over cost optimization
- Companies requiring specialized talent in AI, healthcare tech, fintech, and deep tech

MAHARASHTRA (PUNE)

The Engineering & Scalability Hub



Policy Framework

Pune's Global Capability Centre (GCC) growth is propelled by the Maharashtra IT/ITeS Policy 2023 and strategic infrastructure initiatives like the Pune Metropolitan Region Development Authority (PMRDA). While not a standalone GCC policy, these frameworks are explicitly tailored to develop Pune as a scalable, cost-competitive counterpart to Mumbai, with a distinct focus on engineering and manufacturing-tech integration.

Strategic Positioning and Market Leadership

Pune has cemented its position as India's premier secondary GCC hub, successfully decoupling from Mumbai's shadow to develop a unique identity. Hosting 250-300 GCCs employing approximately 200,000 professionals, Pune captures roughly 12-15% of India's GCC workforce. Its growth is characterized by engineering depth and operational scalability.

The city's sectoral distribution reveals strategic clustering:

- Automotive & Industrial Engineering: 35% of Pune's GCCs, leveraging proximity to the Chakan-Talegaon automotive belt and a vast supplier network.
- Software & IT Services: 30% national share in enterprise software and IT infrastructure GCCs.
- BFSI (Back-office & Analytics): A major hub for analytics, risk management, and IT support centers for global banks and financial institutions.
- Electronics & Embedded Systems: Growing strength in semiconductor design, EV components, and IoT.

Pune's value proposition is built on a "Quality-of-Life Advantage" that aids talent retention, a deep engineering talent pool from its renowned university ecosystem, and 15-25% lower operational costs compared to Bengaluru and Mumbai.

Target Metrics (2024-2029)

- New GCCs: 150-200 new centers, focusing on engineering R&D and mid-scale global delivery.
- New Jobs: Creation of 150,000 new skilled positions.
- Economic Output: Target to increase GCC-led exports from the region by 2x.



Financial Incentives

Pragmatic and Scalability-Focused

Talent Development and Workforce Incentives

- Graduate Hire Subsidy: Reimbursement of ₹5,000 per month per fresh engineering graduate hired from Maharashtra state universities for the first 24 months.
- Specialized Skill Premium: An Additional 25% reimbursement on training costs for employees in AI/ML, cybersecurity, and embedded systems.
- Industry-Academia Bridge Grants: Funding for GCCs to set up dedicated labs and sponsor chair professorships in local engineering colleges like COEP and Savitribai Phule Pune University.

Innovation Infrastructure Funding

- Automotive/Aerospace Cluster Incentive: 25% subsidy on capital expenditure for test labs, simulation software (CAD/CAE), and prototyping equipment, particularly for GCCs integrated with the Chakan industrial corridor.
- Patent-Linked Grants: ₹15 lakh per international patent granted to a Pune-based GCC, doubling if co-filed with a local academic institution.
- Co-Innovation Centers: State support for shared R&D facilities in Hinjewadi and Talegaon, offering GCCs access to advanced testing equipment at subsidized rates.

Capital Investment and Infrastructure Support

- Capital Investment Subsidy: 20% subsidy on fixed capital investment (plant, machinery, IT infrastructure) for units in designated IT parks in Nagar Road, Kharadi, and Hinjewadi Phase 4 & 5.
- Stamp Duty Concession: 100% reimbursement of stamp duty and registration charges for GCCs setting up in PMRDA-notified areas.
- Power Cost Rationalization: Eligibility for industrial power tariffs, representing a 10-15% saving over commercial rates.

Geographic Expansion: "Beyond Pune City" Strategy

To manage urban sprawl, the state encourages decentralization within the region:

- **Target Locations:** Talegaon, Chakan, and Rajgurunagar for manufacturing-adjacent engineering centers; Hadapsar and Baner for IT services.
- **Specific Benefits:** 1.5x multiplier on standard capital subsidies, fast-tracked land allocation, and priority in the Pune Metro expansion plans linking these clusters.

Operational and Event Support

- **Event Hosting Grant:** Up to ₹20 lakh support for hosting national/international tech conferences and engineering summits in Pune.
- **Cluster Development Programs:** State-facilitated consortia for GCCs in similar sectors (e.g., Automotive GCC Forum) to share best practices and address common infrastructure challenges.

Financial Incentives

Pragmatic and Scalability-Focused

Talent Development and Workforce Incentives

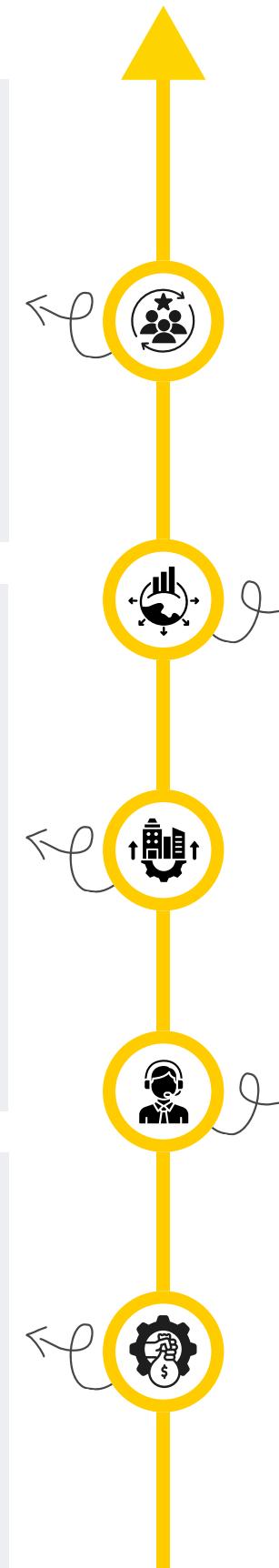
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Operational Support Infrastructure

Single Point of Contact (SPOC) System

A dedicated officer from the Maharashtra Industrial Development Corporation (MIDC) is assigned to GCCs with prospective investments over ₹100 crore, coordinating with various municipal and state departments.

Evolving Single-Window Mechanism

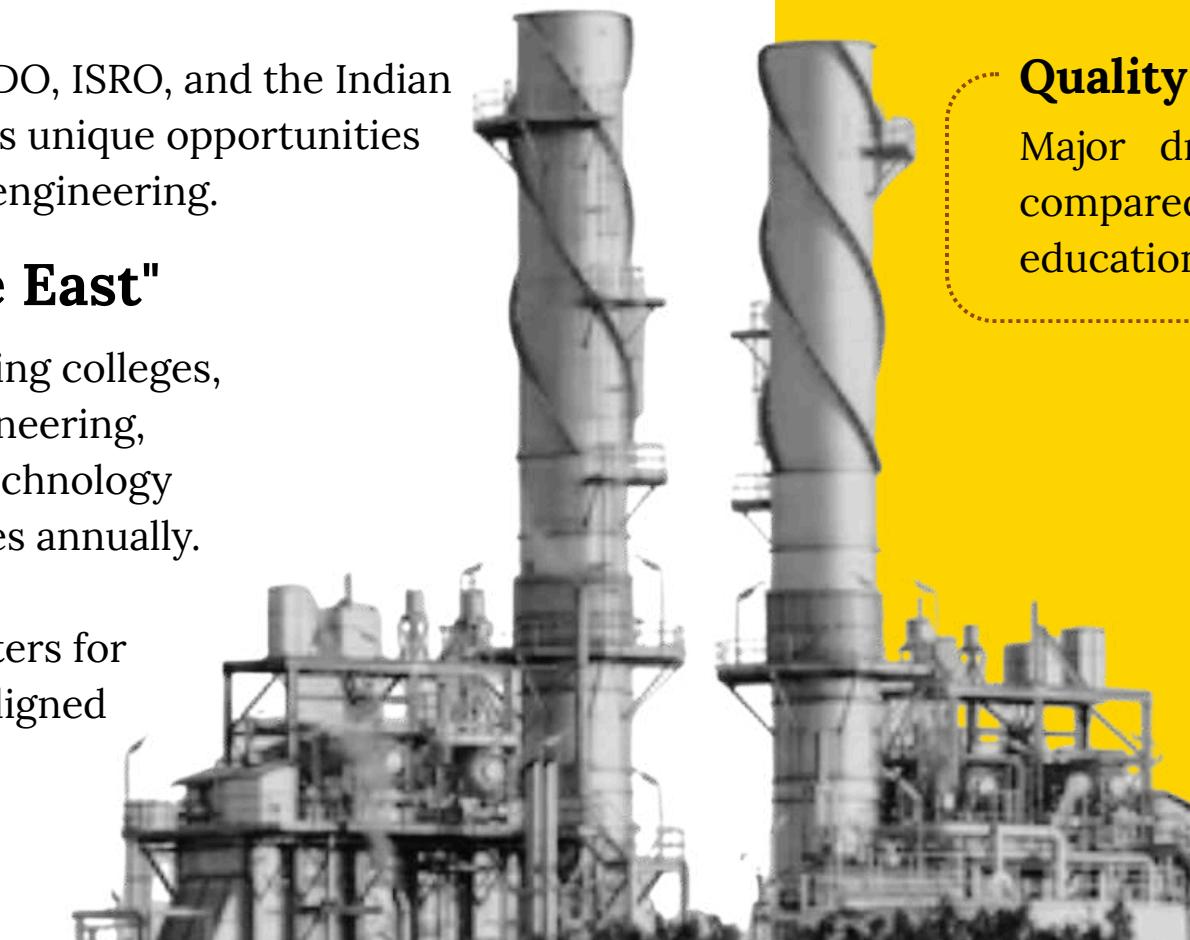
Leveraging the state's Magnetic Maharashtra 2.0 portal for pre-establishment clearances, with an average turnaround time of 30-60 days for GCC projects in approved IT parks.

Innovation & Academia Integration

- Research Park Partnerships:** Strong linkages with IIT Pune's Research Park and Savitribai Phule Pune University's Innovation Center for collaborative projects.
- Defense & Aerospace Synergy:** Proximity to DRDO, ISRO, and the Indian Army's Southern Command headquarters fosters unique opportunities for GCCs in defense technology and aerospace engineering.

Talent Pipeline: The "Oxford of the East"

- Educational Depth:** Home to over 115+ engineering colleges, including premier institutes like College of Engineering, Pune (COEP) and Pune Institute of Computer Technology (PICT). Produces over 50,000 technical graduates annually.
- Skilling Initiatives:** The Maharashtra State Skill Development Corporation runs specialized clusters for advanced manufacturing and IT skills, directly aligned with GCC needs.



Infrastructure Readiness

Digital Infrastructure

Robust fiber optic network across major business districts. Designated as a 5G rollout priority city.

Physical Infrastructure

- Transport:** Pune Metro (Lines 1, 2, and 3 under development) directly connects Hinjewadi IT Park to the city center and airport. The Mumbai-Pune Expressway and the upcoming Ring Road aim to ease intra-city and inter-city logistics.
- Air Connectivity:** Pune International Airport with growing international routes, supplemented by easy access to Mumbai's Chhatrapati Shivaji Maharaj International Airport (3-hour drive).

Quality of Life

Major draw for talent seeking a better work-life balance compared to Mumbai or Bengaluru, with a vibrant cultural scene, educational institutions, and proximity to hill stations.

Assessment Pune's

Strategic Advantages and Constraints



Strengths

- Engineering Talent Concentration:** Unparalleled access to a vast, high-quality pool of mechanical, automotive, and software engineering graduates, making it ideal for product development and R&D.
- Cost-Quality Balance:** Offers significant cost savings (real estate, salaries) over Tier 1 hubs while maintaining high talent quality and superior livability, leading to lower attrition (12-16%).
- Industrial-Academic Symbiosis:** Deep, organic connections between industry and a dense network of engineering colleges foster innovation and a steady talent pipeline.
- Scalability:** Ample land and developing infrastructure in new corridors (e.g., Hinjewadi Phase 4) allow for large, integrated campuses that are challenging to build in saturated metros.

Challenges

- International Connectivity Lag:** Limited direct international flights compared to Bengaluru, Mumbai, or Hyderabad, often requiring connections for global travel.
- Urban Infrastructure Strain:** While improving, intra-city traffic congestion remains a pain point, though the metro system promises future relief.
- Ecosystem Specialization:** Perceived as less diverse than Bengaluru, with stronger plays in engineering/IT services than in cutting-edge fintech or consumer tech R&D.
- Regulatory Complexity:** Navigating multiple municipal (PCMC, PMC) and state bodies can be more complex than in single-authority zones like Gift City or dedicated hubs in Telangana.

Optimal For

- Engineering & Automotive R&D Centers:** Global automotive, industrial engineering, and hardware companies seeking deep technical talent.
- Enterprise Software & SaaS GCCs:** Product development and engineering hubs for B2B software.
- Scalable IT Delivery & Back-office Operations:** Cost-effective centers for BFSI analytics, IT infrastructure, and shared services seeking stability and lower attrition.
- Companies pursuing a "Hub-and-Spoke" Model:** Organizations with leadership hubs in Mumbai or Bengaluru looking for a scalable, cost-optimized delivery spoke with strong engineering capabilities.

TAMIL NADU (CHENNAI)

The Manufacturing & Deep-Tech Engineering Hub



Policy Framework

Chennai's evolution into a powerhouse for Global Capability Centers (GCCs) is strategically guided by the Tamil Nadu Electronics Hardware Manufacturing Policy 2022 and the broader Tamil Nadu Industrial Policy 2023. These policies, supplemented by the Chennai Metropolitan Development Authority (CMDA) master plans, are meticulously crafted to reinforce the state's dominance in advanced manufacturing. The framework explicitly positions Chennai not merely as a cost center but as a strategic partner for global manufacturing and deep-tech R&D, leveraging its unparalleled ecosystem of suppliers, ports, and engineering institutions.

Strategic Positioning and Market Leadership

Chennai has authoritatively established itself as India's undisputed capital for manufacturing-led GCCs, seamlessly integrating global engineering centers with the shop floor. Hosting 200-250 GCCs employing over 180,000 professionals, it commands a dominant share in industrial sectors. Its growth is fueled by engineering rigor, supply chain integration, and a pragmatic talent pool.



The city's sectoral supremacy is built on foundational industries:

- **Automotive & Heavy Engineering:** 40% of Chennai's GCCs, anchored by the "Detroit of India" ecosystem. Global OEMs and Tier-1 suppliers run core R&D, product development, and digital twin centers.
- **Aerospace & Defense:** A 25% national share in aerospace engineering GCCs, synergizing with units of DRDO, Boeing, and Airbus, focusing on design, avionics, and MRO (Maintenance, Repair, Overhaul).
- **Deep-Tech & Hardware R&D:** 20% presence in semiconductor design, embedded systems, and industrial IoT, supported by a strong VLSI and chip design talent pipeline.
- **Enterprise Software & BFSI (FinTech Specialization):** A growing hub for financial technology, enterprise application product development, and captive centers for global banks, leveraging robust IT infrastructure.

Chennai's compelling value proposition rests on a "Plug-and-Play Industrial Ecosystem" with direct access to supplier parks and ports, a highly stable and technically proficient talent base, and 25-30% lower operational costs compared to Bengaluru, with superior affordability in real estate and utilities.

Target Metrics (2024-2029)

- **New GCCs:** Attract 100-150 new centers, with a focus on manufacturing-tech, aerospace engineering, and semiconductor design.
- **New Jobs:** Creation of 125,000 new high-skilled engineering and R&D positions.
- **Economic Output:** Target to increase the GCC sector's contribution to the state's engineering exports by 2.5x.
- **R&D Intensity:** Aim for 20% of new GCCs to establish dedicated R&D and testing labs.

Financial Incentives

Industrial-Grade and R&D-Focused

Talent and Workforce Development Incentives

- Engineering Graduate Hire Reimbursement:** ₹4,500 per month per graduate hired from Tamil Nadu engineering colleges for the first 36 months, emphasizing retention.
- Advanced Engineering Skill Premium:** 30% subsidy on specialized training in robotics, additive manufacturing, composite materials, and ASIC design.
- Industry-Academia Co-Location Grants:** Capital grants for GCCs to establish Applied Engineering Labs within premier campuses like IIT Madras, Anna University, and CEG.

Innovation and R&D Infrastructure

Funding

- Industry 4.0 Transformation Grant:** 25% capital subsidy for setting up smart factory labs, digital twin platforms, and advanced prototyping facilities, especially in the OMR (Old Mahabalipuram Road) and Ambattur industrial belts.
- Patent Commercialization Grant:** ₹25 lakh for every patent filed and commercialized from a Chennai-based GCC, with an additional 50% bonus for patents leading to production within Tamil Nadu.
- Shared Testing Facility Support:** 50% subsidy on access costs for GCCs utilizing state-promoted common testing centers for automotive components, aerospace materials, and electronics.



Capital Investment and Operational Support

- Strategic Project Capital Subsidy:** 15-25% subsidy on fixed capital investment for GCCs in designated corridors (OMR, Siruseri, Guindy) and emerging nodes like Chengalpattu.
- Stamp Duty and Land Cost Rationalization:** 100% exemption on stamp duty for GCCs in SIPCOT (State Industries Promotion Corporation of Tamil Nadu) IT parks and SEZs.
- Green Infrastructure Incentive:** An additional 5% capital subsidy for GCCs achieving IGBC Platinum/Gold ratings or implementing significant renewable energy capacity.

Geographic Diversification: "The Chennai-Northern Corridor" Strategy

To decongest the core and tap into emerging talent pools, the state incentivizes expansion along key routes:

- **Target Nodes:** Sriperumbudur-Oragadam (auto/electronics adjacency), Chengalpattu (aerospace/defense corridor), and Tiruvallur (logistics and hardware).
- **Specific Benefits:** Priority power allocation, fast-tracked environmental clearances, and enhanced capital subsidy of 30% for first movers in these designated zones.

Ecosystem and Operational Support

- **Global Engineering Summit Grant:** Support up to ₹25 lakh for hosting international engineering, manufacturing, and deep-tech conferences in Chennai.
- **Sector-Specific Consortia:** State-facilitated formation of GCC Leadership Forums (e.g., Automotive GCC Council) to jointly address talent, infrastructure, and policy advocacy.



Operational Support Infrastructure

1

Dedicated Facilitation Cell (GCC SPOC)

A dedicated officer from Guidance Tamil Nadu acts as a single point of contact for prospective GCCs, coordinating across SIPCOT, CMDA, and TNEB (Electricity Board) for seamless project execution.

2

Enhanced Single-Window Portal

Leveraging the BUSINESS.EASE.TN portal for integrated approvals, targeting a 30-day clearance for GCC projects in pre-approved zones, with a dedicated track for R&D-intensive units.

3

Premier Academia and Research Integration

- IIT Madras Research Park Synergy:** Deep, functional partnerships with India's #1 engineering institute for collaborative research, startup engagement, and executive education.
- Defense & Aerospace Corridor Access:** Unparalleled proximity to the Tamil Nadu Defense Corridor, facilitating collaboration with DRDO labs, Ordnance Factories, and private defense majors for dual-use technologies.

4

Talent Pipeline: "The Engine of Applied Engineering"

- Educational Depth:** Home to 200+ engineering colleges, including premier institutes like IIT Madras, College of Engineering Guindy (CEG), and SSNSN. Produces over 80,000 technical graduates annually with a strong bent towards core engineering.
- Skilling Infrastructure:** Tamil Nadu Skill Development Corporation (TNSDC) collaborates with GCCs to run Advanced Manufacturing Technology Centers and IT/ITeS labs tailored to industry needs.

5

Infrastructure Readiness

- Digital Infrastructure:** Robust submarine cable landing station at Chennai, making it a key data hub. An extensive fiber network across business districts.
- Physical Infrastructure:**
 - Transport:** Chennai Metro Phase 1 & 2, improving connectivity to key clusters. The Chennai Port & Kamarajar (Ennore) Port facilitate hardware import/export. Six-lane ORR (Outer Ring Road) and the upcoming Chennai-Bengaluru Expressway enhance logistics.
 - Air Connectivity:** Chennai International Airport with growing direct cargo and passenger connectivity to Southeast Asia and the Middle East.
 - Quality of Life:** Offers a unique blend of metropolitan amenities, rich cultural heritage, coastal access, and a lower cost of living, contributing to high talent stability and low attrition (10-14%).

Assessment Chennai's Strategic Advantages and Constraints

Strengths

- Unrivaled Manufacturing & Supply Chain Integration:** Direct adjacency to industrial clusters and ports allows GCCs to co-innovate and validate technologies in real-time with production lines.
- Deep and Stable Engineering Talent:** Renowned for a large, technically sound, and highly retentive workforce specializing in mechanical, automotive, and hardware engineering.
- Cost-Competitive Scalability:** Significant cost advantages in real estate and operations compared to Western metros, enabling large-scale engineering campus setups.
- Strong Institutional Governance:** A long history of successful public-private partnerships and a relatively stable, industry-friendly state government policy environment.

Challenges

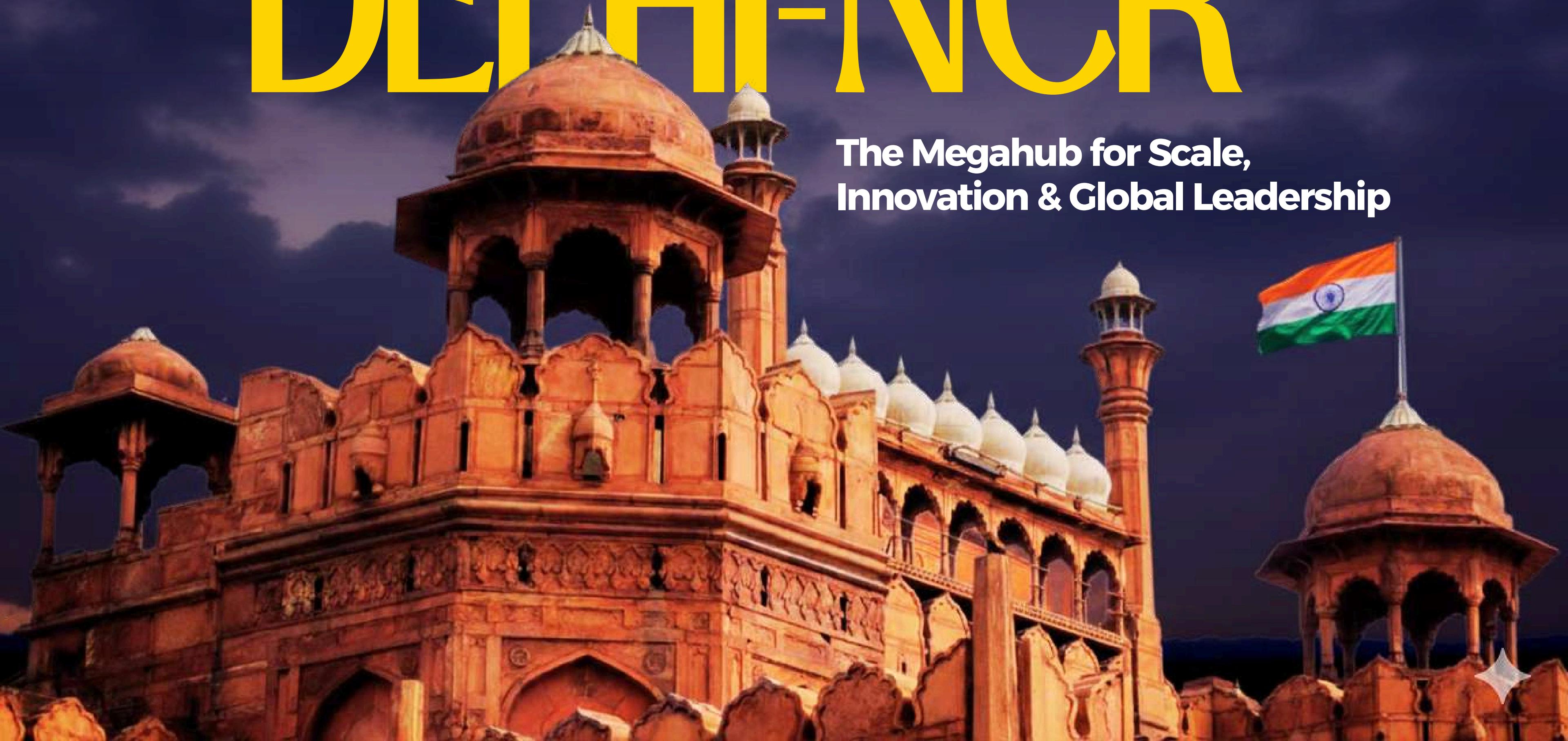
- Perceived Ecosystem Gap in Consumer Tech:** While strong in B2B and industrial tech, perceived as less vibrant for consumer internet, SaaS, and cutting-edge fintech innovation compared to Bengaluru or Mumbai.
- Infrastructure Strain:** Seasonal water challenges and intra-city traffic congestion, though metro and road projects are addressing these.
- International Air Connectivity:** Fewer direct long-haul flights compared to Delhi, Mumbai, or Bengaluru, requiring connections for travel to Europe and North America.
- Cultural Adaptation for Expatriates:** While improving, it may be perceived as having a steeper cultural adaptation curve for a diverse global workforce compared to more cosmopolitan hubs.

Optimal For

- Global Manufacturing & Automotive R&D Centers:** OEMs and industrial engineering giants seeking end-to-end product design, testing, and launch support.
- Aerospace, Defense & Heavy Engineering GCCs:** Engineering centers for design, simulation, and systems integration in complex hardware domains.
- Semiconductor & Hardware Product Design:** R&D hubs for VLSI, embedded systems, and electronic product development.
- Enterprise & B2B Software Product Development:** GCCs focusing on engineering-heavy enterprise software, cloud infrastructure, and cybersecurity products.
- Companies seeking Operational Resilience & Cost-Effective Scale:** Organizations looking for a stable, scalable, and integrated engineering base with strong supply chain linkages.

DELI-NCR

**The Megahub for Scale,
Innovation & Global Leadership**



Policy Framework

A multi-layered policy architecture propels Delhi-NCR's dominance as India's largest and most diverse GCC agglomeration. This includes the National Capital Region Planning Board (NCRPB) framework, state-specific policies such as the Haryana Enterprise Promotion Policy 2020 and the UP IT & Startup Policy 2023, as well as direct access to central government ministries. This composite framework is uniquely tailored to support unmatched scale, strategic innovation in consumer tech and BFSI, and the hosting of regional/global leadership centers, offering a blend of metropolitan advantages and strategic depth.

Strategic Positioning and Market Leadership

Delhi-NCR is not merely a hub; it is a continent of GCC activity, functioning as the de facto Asia-Pacific headquarters for numerous global corporations. Hosting 350-400+ GCCs employing over 500,000 professionals, it accounts for ~25% of India's GCC workforce. Its growth is characterized by massive scale, leadership density, and sectoral diversification across the specialized sub-clusters of Gurugram, Noida, and Delhi.

The region's sectoral distribution showcases its leadership in high-impact domains:

- BFSI & FinTech Leadership (Gurugram):** 35% of NCR's GCCs, constituting the largest cluster of global financial captives in Asia for risk, analytics, digital banking, and actuarial science.
- Consumer Internet, E-commerce & SaaS (South Delhi/Gurugram):** 25% national share, hosting global capability centers for the world's largest retail, travel, and hospitality giants, driving digital marketing, supply chain tech, and product management.
- Global Business Services & Shared Leadership Centers (Noida):** A major hub for IT infrastructure, cybersecurity, and global business services, alongside a growing number of regional HQ setups.
- R&D, Telecom & Industrial Tech:** Strong presence in telecom R&D (aligned with adjacent R&D centers), healthcare IT, and engineering for industrial conglomerates.

Delhi-NCR's value proposition is built on "Unmatched Leadership Access & Talent at Scale." It offers direct proximity to central government and regulatory bodies, a vast, multilingual, and leadership-ready talent pool from across North India, and a high-quality urban infrastructure that supports C-suite and expatriate settlement.

Target Metrics (2024-2029)

- New GCCs & HQ Expansions:** Attract 200-250 new centers, with a significant focus on Global/APAC Leadership Hubs (HQs) and advanced R&D.
- New Jobs:** Creation of 300,000+ new skilled positions, with an emphasis on high-value roles in strategy, analytics, and technology.
- Economic Leadership:** Target to host 40% of all India-based global/regional headquarters of multinational corporations.
- R&D Investment:** Increase the region's share of GCC-led patent filings in consumer tech and financial services by 50%.

Financial Incentives

Strategic, Scale-Oriented, and Leadership-Focused

Leadership Talent & Skill Development

- Executive Hire Support:** Reimbursement of ₹10 lakh per hire for relocating or hiring global/regional leads (VP+ level) to an NCR-based GCC.
- Future-Skills Premium:** 30% reimbursement on costs for advanced training in GenAI, Quantum Computing, Cybersecurity, and Digital Regulation.
- Centers of Excellence (CoE) Grants:** Capital grants for establishing Global CoEs in collaboration with institutions like IIT Delhi, Indian Statistical Institute, and Delhi School of Economics.

Innovation & Strategic R&D Funding

- Global HQ Setup Grant:** A one-time grant of ₹2 Crore for establishing a regional or global headquarters with a minimum of 50 leadership roles in NCR.
- RegTech/Sandbox Innovation Incentive:** ₹50 lakh for GCCs developing and piloting solutions in partnership with RBI's regulatory sandbox or other central bank innovation hubs.
- Consumer Tech R&D Subsidy:** 25% subsidy on capex for setting up AI/ML labs, UX design studios, and behavioral analytics centers, particularly in Gurugram and Cyber City districts.

Capital Investment & Infrastructure Support

- Strategic Project Subsidy (Haryana/UP):** 15-20% subsidy on fixed capital investment for large campuses (> 500 seats) in Dwarka Expressway (Gurugram), Noida Expressway, or Aerocity.
- Stamp Duty Exemption:** 100% exemption in designated sectors of Haryana and Uttar Pradesh for GCCs and HQ establishments.
- Power Tariff Concession:** Eligibility for industrial power tariffs in Noida & Greater Noida, providing 15-20% savings over commercial rates in Delhi.

Geographic Strengthening: "The NCR Corridor Strategy"

To optimize the polycentric model and manage density:

- Target Expansion Nodes:** Jewar (linked to upcoming airport), Faridabad (industrial-tech integration), Ghaziabad (hardware/defense adjacency), and Dwarka Expressway.
- Specific Benefits:** Fast-tracked approvals via dedicated NCR cells, enhanced capital subsidy (up to 25%), and priority infrastructure linkage to Jewar International Airport and Regional Rapid Transit System (RRTS).

Ecosystem & Global Connectivity Support

- Global Summit Hosting Grant:** Support up to ₹1 Crore for hosting international industry summits, global board meetings, and leadership conferences in NCR.
- Policy Advocacy SPOC:** A dedicated joint-secretary-level officer from the Department for Promotion of Industry and Internal Trade (DPIIT) to facilitate large GCC/HQ projects requiring central ministry coordination.

Operational Support Infrastructure



Multi-Authority Single Point of Contact (SPOC)

A tripartite facilitation committee with representatives from Invest India, HSIIDC (Haryana), and Noida Authority is formed for projects over ₹500 crore, ensuring synchronized clearances across state and central jurisdictions.

Advanced Single-Window Mechanism

Leveraging the central 'Invest India' portal and state-level systems (HARTRON in Haryana, Nivesh Mitr in UP) for integrated approvals, with a 48-hour expedited channel for GCC expansion projects.

Unparalleled Access to Regulators & Academia

- Regulatory Proximity:** Direct access to RBI, SEBI, IRDAI, TRAI, and key ministries (Finance, Commerce, Electronics & IT) for fintech, telecom, and policy-adjacent GCCs.
- Premium Academic Integration:** Deep partnerships with IIT Delhi, IIIT Delhi, JNU, Ashoka University, and ISB for research, executive talent, and leadership development programs.

Talent Pipeline: "The National Leadership Reservoir"

- Unmatched Depth & Diversity:** Draws from 500+ universities and colleges across North India. Produces over 300,000 graduates annually in engineering, management, finance, and liberal arts, with strong soft skills and leadership aptitude.
- Global Talent Attraction:** Superior international schools, healthcare, and expatriate communities make it the preferred location for global leaders and returning Indian diaspora.

World-Class Infrastructure Readiness

- Digital Infrastructure:** India's largest internet exchange (NIXI), excellent fiber penetration, and a 5G rollout leader.
- Physical & Air Connectivity:**
 - Transport:** Delhi Metro (the world's largest network) seamlessly connects all major business districts. RRTS will connect to Meerut, Panipat, and Alwar. World-class arterial roads and expressways.
 - Air Connectivity:** Indira Gandhi International Airport (India's largest, with direct global connectivity to 70+ countries). Upcoming Jewar International Airport (Noida) is to be India's largest upon completion.
- Quality of Life (Tier-1 Standard):** Unparalleled cultural amenities, dining, retail, international healthcare, and proximity to global diplomatic communities.

Assessment Delhi-NCR's

Strategic Advantages and Constraints

Strengths

- Unrivaled Scale & Leadership Access:** The only Indian hub capable of hosting global headquarters with direct proximity to policymakers, regulators, and a vast, diverse talent pool for all corporate functions.
- Sectoral Dominance in BFSI & Consumer Tech:** The undisputed leader for global financial services and consumer internet giants, offering deep ecosystem maturity.
- World-Class Urban & Air Connectivity:** Superior international and domestic travel infrastructure, coupled with a metro network that enables large-scale workforce mobility.
- Leadership-Grade Livability:** The only location that consistently meets the high lifestyle, schooling, and security expectations of global C-suite executives and expatriates.

Challenges

- High Operational Cost:** Premium real estate (especially in core areas) and salary inflation for leadership roles make it the most expensive GCC location in India.
- Regulatory & Bureaucratic Complexity:** Navigating the multi-layered governance of Delhi, Haryana, and UP within the NCR can be challenging compared to single-state hubs.
- Environmental Factors:** Seasonal air quality issues pose a reputational and livability challenge, despite mitigation efforts.
- Saturation in Core Zones:** Prime locations like Cyber City (Gurugram) and Sector-62 (Noida) face infrastructure strain and traffic congestion, pushing expansion to newer corridors.

Optimal For

- Global & APAC Headquarters (HQs):** Corporations looking to relocate regional leadership, strategy, finance, and legal centers to India.
- BFSI & FinTech Powerhouses:** Banks, insurers, and fintech firms requiring deep regulatory engagement, complex analytics, and risk management captives.
- Consumer Tech & Digital Giants:** E-commerce, SaaS, and media companies driving global digital marketing, product management, and supply chain innovation.
- Government & Regulatory Affairs-Intensive Sectors:** Companies in sectors like pharma, telecom, and energy that benefit from proximity to central ministries.
- Companies pursuing a "Center of Excellence" Model:** Organizations seeking to consolidate strategic functions (AI/ML, Cybersecurity, Advanced Analytics) for global operations in one location.

GUJARAT (GANDHINAGAR)

**The Strategic Extension & Policy-
Adjacent Hub**

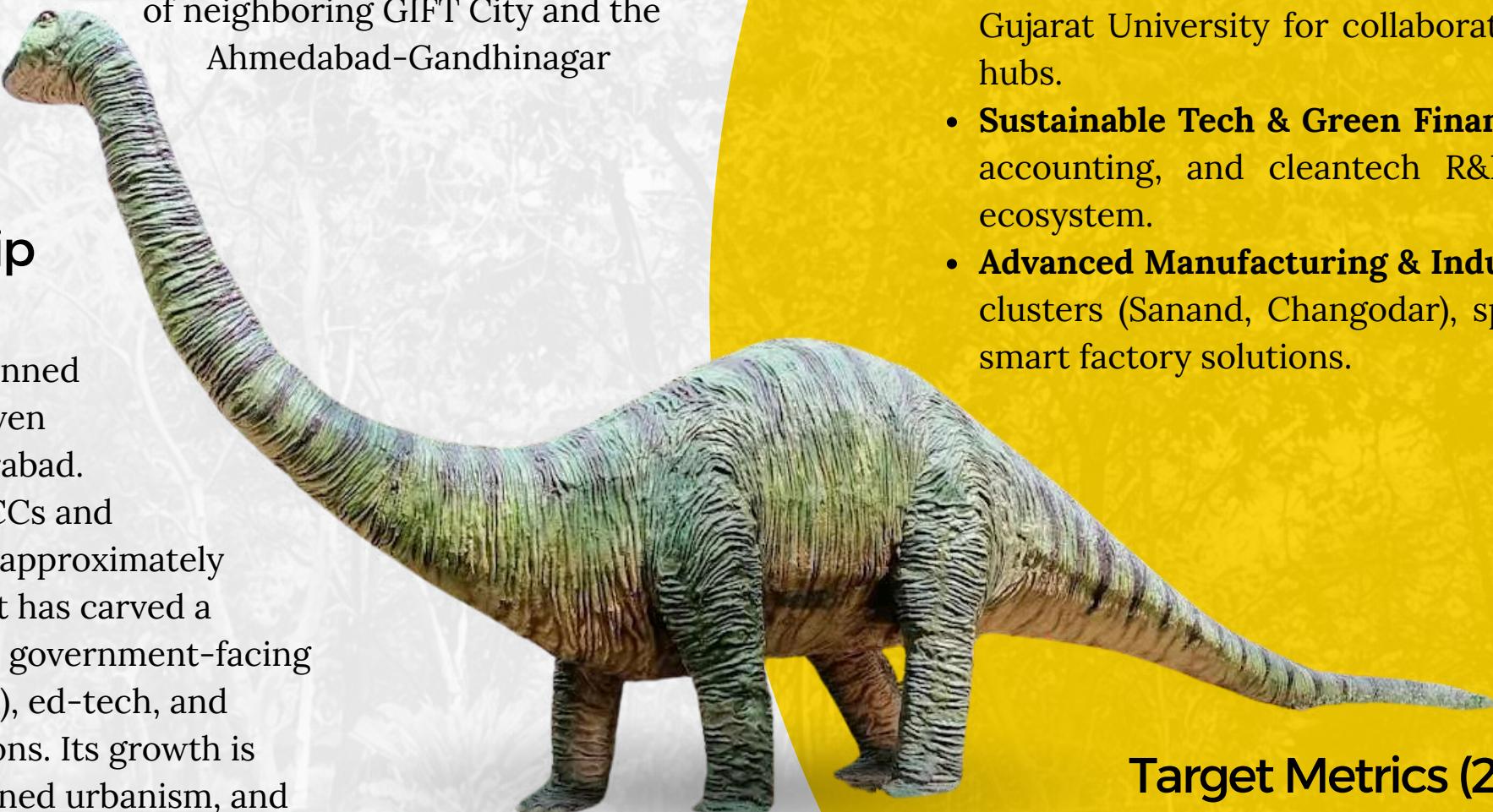


Policy Framework

Gandhinagar's emergence as a structured GCC extension is anchored by the Gujarat IT/ITeS Policy 2022-27 and its symbiotic relationship with the GIFT City Special Economic Zone. This framework is deliberately crafted to position Gandhinagar not as a standalone destination, but as a strategic, policy-adjacent satellite that offers the stability, planned infrastructure, and academic density of a capital city, while leveraging the global financial ecosystem of neighboring GIFT City and the industrial might of the Ahmedabad-Gandhinagar corridor.

Strategic Positioning and Market Leadership

Gandhinagar has strategically evolved into the deliberate, planned counterpart to the market-driven clusters of Gurugram or Hyderabad. Hosting 40-60+ established GCCs and specialized centers employing approximately 35,000-50,000 professionals, it has carved a niche as the preferred base for government-facing tech, regulatory tech (RegTech), ed-tech, and sustainability-focused operations. Its growth is characterized by stability, planned urbanism, and deep institutional linkages.



The city's sectoral distribution reflects its strategic adjacency to government and academia:

- **GovTech & RegTech:** 30% of Gandhinagar's GCCs, serving as technology arms for global firms engaging with central and state government digital infrastructure projects (e.g., smart cities, Aadhaar-linked systems).
- **Education Technology & R&D:** 25% presence, leveraging proximity to DA-IICT, PDPU, and Gujarat University for collaborative research, content development, and learning solution hubs.
- **Sustainable Tech & Green Finance Support:** 20% cluster, providing ESG analytics, carbon accounting, and cleantech R&D services, feeding into the GIFT City green finance ecosystem.
- **Advanced Manufacturing & Industrial IoT:** 15% focused on software for adjacent industrial clusters (Sanand, Changodar), specializing in digital twins, supply chain automation, and smart factory solutions.

Gandhinagar's value proposition is built on "Planned Efficiency & Institutional Access." It offers superior civic infrastructure and lower congestion than most metros, a high-quality talent pool from premier local institutes, and 15-20% lower operational costs than Hyderabad or Pune, with the added advantage of proximity to state and national policy institutions.

Target Metrics (2024-2029)

- **New GCCs:** Attract 75-100 new centers, with a focus on GovTech, EdTech, and green software solutions.
- **New Jobs:** Creation of 40,000-60,000 new skilled positions in software development, data science, and public policy analytics.
- **Economic Output:** Target to increase the IT/GCC sector's contribution to the district's GDP 3x.
- **Global Partnerships:** Establish 10+ international university-GCC joint research centers within the GIFT City-Gandhinagar knowledge corridor.

Financial Incentives

Stability-Focused and Ecosystem-Linked

Talent and Academic Integration Incentives

- Capital City Retention Grant:** ₹4,000 per month per graduate hired from Gujarat-based universities and choosing to reside in Gandhinagar for the first 36 months.
- Public Policy Tech Fellowship:** State co-funding for 50% of salaries for professionals with dual degrees in technology and public policy/administration, working on GovTech projects.
- Academic "Sandbox" Grant:** Grants covering up to ₹2 Crore for GCCs to set up live project labs within university campuses (e.g., DA-IICT, IAR Gandhinagar) focused on civic tech solutions.

Innovation & Strategic R&D Funding

- Civic Tech Challenge Fund:** ₹50 lakh grant for GCCs developing and piloting solutions for urban management, public health, or education delivery in partnership with the Gujarat government.
- GIFT City Synergy Bonus:** An additional 15% capital subsidy for GCCs in Gandhinagar that demonstrate 30%+ of their revenue comes from servicing entities within GIFT City.
- IP Generation for Public Good:** ₹20 lakh per patent granted for the domains of water, renewable energy, or public digital infrastructure.

Good: ₹20 lakh technologies in management, integration,

Capital Investment and Operational Support

- Planned City Premium Subsidy:** 25% subsidy on fixed capital investment for offices within the Gujarat International Finance Tec-City (GIFT) SEZ extension area and the Infocity campus.
- Stamp Duty Exemption:** 100% exemption on lease or purchase of property in designated IT parks and the Gandhinagar Capital Region.
- Power and Water Security:** Guaranteed industrial-grade power and water supply at rates 10% below the Ahmedabad commercial tariff, with a 99.5% uptime commitment.



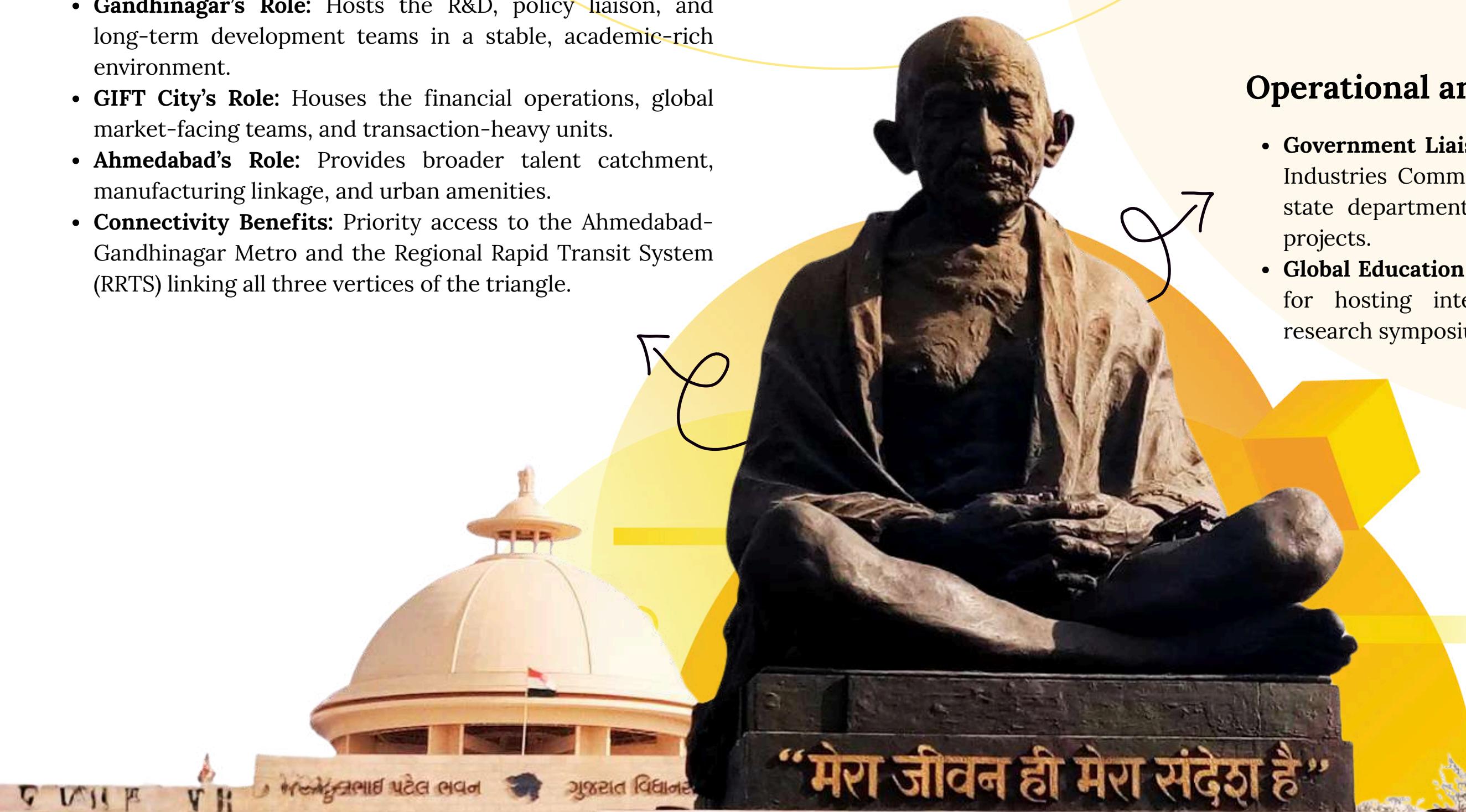
Geographic Synergy: "The GIFT-Gandhinagar-Ahmedabad Golden Triangle"

The strategy leverages the complementary strengths of the region's three nodes:

- **Gandhinagar's Role:** Hosts the R&D, policy liaison, and long-term development teams in a stable, academic-rich environment.
- **GIFT City's Role:** Houses the financial operations, global market-facing teams, and transaction-heavy units.
- **Ahmedabad's Role:** Provides broader talent catchment, manufacturing linkage, and urban amenities.
- **Connectivity Benefits:** Priority access to the Ahmedabad-Gandhinagar Metro and the Regional Rapid Transit System (RRTS) linking all three vertices of the triangle.

Operational and Institutional Support

- **Government Liaison SPOC:** A dedicated officer from the Industries Commissionerate acts as a bridge to relevant state departments for GCCs working on public sector projects.
- **Global Education Conclave Grant:** Support up to ₹15 lakh for hosting international education technology and research symposiums in Gandhinagar.



Operational Support Infrastructure

Dedicated GCC Facilitation Cell

A joint cell of GIFT City SEZ authorities and the Gujarat Industrial Development Corporation provides combined clearances for entities operating across both zones.

Gujarat Single Window Portal Integration

Seamless integration with the state's SWAGAT (Single Window Application for Green and Automated Transparent) portal for business approvals, targeting 20-day clearances for projects in pre-approved zones.

Premier Academic & Research Integration

- DA-IICT & PDPU Depth:** Direct partnerships with Dhirubhai Ambani Institute of Information and Communication Technology (DA-IICT) and Pandit Deendayal Energy University (PDPU) for specialized talent in ICT and energy tech.
- Gujarat National Law University (GNLU) Linkage:** Unique advantage for GCCs in RegTech, legal process automation, and compliance tech through formal collaboration programs.

Talent Pipeline: "The Quality-Over-Quantity Reservoir"

- Educational Depth:** Home to DA-IICT, PDPU, GNLU, and the Gujarat University campus, producing a highly selective pool of 10,000+ premium graduates annually in computer science, law, and engineering.
- Skilling Initiatives:** Gujarat Skill Development Mission runs specialized programs in GovTech, FinTech support services, and sustainability analytics in partnership with local GCCs.

Infrastructure Readiness: A Planned Capital

- Digital Infrastructure:** Gujarat State Wide Area Network (GSWAN) backbone offers high-speed, secure connectivity for government-linked projects. Seamless fiber integration with GIFT City.
- Physical Infrastructure:**
 - Transport:** Ahmedabad-Gandhinagar Metro provides seamless connectivity. Sardar Patel Ring Road ensures quick access to the international airport and industrial zones.
 - Air Connectivity:** Sardar Vallabhbhai Patel International Airport, Ahmedabad (20-25 mins drive) with growing international routes.
- Quality of Life:** Wide, green boulevards, low pollution, ample housing, and proximity to Ahmedabad's amenities offer a highly stable, family-oriented lifestyle that attracts and retains talent.



Assessment Gandhinagar's

Strategic Advantages and Constraints

Strengths

- **Planned City Advantages:** Superior urban planning, reliable utilities, and minimal congestion translate to higher productivity and lower operational friction.
- **Policy & Institutional Access:** Unparalleled proximity to state government headquarters and national policy institutes facilitates easier engagement for GovTech and regulated sectors.
- **Academic Proximity & Quality:** Direct, walkable access to premier educational institutions enables deep, daily collaboration and a steady pipeline of high-caliber graduates.
- **Cost-Competitive Stability:** Offers metro-quality talent and infrastructure at tier-2 costs, coupled with very low attrition rates (8-12%) due to quality of life.
- **GIFT City Synergy:** Ability to split functions—strategic R&D and policy teams in Gandhinagar, financial operations in GIFT—creates a powerful hybrid model.

Challenges

- **Ecosystem Scale:** The overall number of GCCs and professionals is an order of magnitude smaller than major hubs, limiting peer networking and talent poaching pools.
- **Perception as a "Government Town":** May be overlooked by fast-moving consumer tech or B2C companies seeking a more vibrant, consumer-facing ecosystem.
- **Dependence on Ahmedabad:** For major aviation connectivity, niche dining/entertainment, and a broader range of talent, reliance on the neighboring city is a factor.
- **Limited International Exposure:** The talent pool, while excellent, may have less prior exposure to global corporate cultures compared to graduates from Bangalore or Delhi-NCR.

Optimal For

- **GovTech & RegTech Specialists:** Companies building solutions for digital governance, smart cities, financial regulation, or legal process automation.
- **Education Technology & Content Hubs:** Global ed-tech firms seeking deep academic partnerships for content development and pedagogical R&D.
- **Strategic R&D Centers:** Units focused on long-term, deep-tech innovation (esp. in sustainability, energy, ICT) that benefit from academic collaboration and a distraction-free environment.
- **GIFT City Complementary Operations:** Support functions, risk modeling teams, or technology labs for financial institutions whose core transactional units are in GIFT City.
- **Companies Prioritizing Operational Stability:** Organizations for whom predictable infrastructure, low attrition, and smooth government interactions outweigh the buzz of a larger ecosystem.

ODISHA (BHUBANESWAR)

The Emerging Cost-Effective & Sustainability-Focused Hub



Policy Framework

Odisha's strategic foray into the GCC landscape is driven by the Odisha Information & Communication Technology (ICT) Policy 2022 and the Electronics Policy 2021. These are reinforced by the state's "5T Initiative" (Technology, Transparency, Teamwork, Time, leading to Transformation) governance model, ensuring rapid implementation. While lacking a standalone GCC policy, these frameworks are explicitly designed to position Bhubaneswar—a designated "Smart City"—as an attractive, emerging destination for GCCs seeking a unique blend of ultra cost-competitiveness, sustainability, and a stable talent pool. The state leverages its prowess in metallurgy, mining, and heavy industries to carve a niche for GCCs in industrial tech and green energy.

Strategic Positioning and Market Leadership

Odisha, anchored by its capital Bhubaneswar, is establishing itself as a deliberate, emerging alternative in the GCC geography. Currently hosting 15-25 GCCs and IT captives employing approximately 8,000-12,000 professionals, it represents a small but growing fraction of India's GCC workforce. Its growth is characterized by high-value niche operations in engineering services, industrial IoT, and green tech, benefiting from the state's core industrial strengths.



The state's sectoral focus leverages its natural industrial and institutional advantages:

Industrial & Metallurgical Tech

30% of Odisha's GCCs, focusing on digital twins for mining, process automation for steel/cement plants, and supply chain optimization for heavy industries.

Green Energy & Sustainability Tech

25% presence, centered on renewable energy management, carbon credit analytics, and ESG (Environmental, Social, and Governance) reporting platforms, aligning with Odisha's green hydrogen and solar power ambitions.

GovTech & Public Digital Infrastructure

20% cluster, developing solutions for smart cities, public health informatics, and education tech, supported by proactive government partnerships.

Enterprise Software & BFSI Back-office

A growing hub for cost-effective back-office operations, financial analytics, and enterprise software support for global firms.

Odisha's compelling value proposition is built on "Ultra Cost Advantage & Purpose-Driven Innovation." It offers the lowest operational costs among major IT destinations in India, a highly stable and loyal talent pool from a dense network of engineering colleges, and a high quality of life with minimal urban stress. This is amplified by the state's clear focus on sustainability and industrial-tech integration.

Target Metrics (2024-2029)

- **New GCCs:** Attract 50-75 new centers, focusing on niche engineering, sustainability tech, and global business services.
- **New Jobs:** Creation of 25,000-35,000 new skilled positions in technology and analytics.
- **Economic Output:** Target to increase the IT/GCC sector's contribution to the state's GDP by 5x.
- **Sustainability Leadership:** Aim for 30% of new GCC investments to have a declared focus on green technology or sustainable operations.



Financial Incentives

Ultra-Competitive and Niche-Focused

Talent Development and Workforce Incentives

- Graduate Employment Incentive (GEI):** Reimbursement of ₹5,000 per month per graduate hired from Odisha's universities for the first 36 months, with an additional ₹1,000 per month for women employees.
- Specialized Upskilling Grant:** 40% reimbursement of training costs for employees in AI/ML, Data Science, Cybersecurity, and IoT, with a higher 60% for skills directly related to green tech and industrial automation.
- Industry-Academia Catalyst Grant:** Funding for GCCs to establish "Centres of Relevance" within campuses of institutions like IIT Bhubaneswar, NIT Rourkela, and KIIT University, focusing on applied research.

Capital Investment and Operational Support

- Strategic Project Capital Subsidy:** 25% subsidy on fixed capital investment (FCI) for GCCs in designated IT parks (Infovalley, Infocity), with an additional 5% for units achieving net-zero energy or water-positive status.
- Stamp Duty & Electricity Duty Exemption:** 100% reimbursement of stamp duty and 5-year exemption on electricity duty.
- Power Cost Advantage:** Access to industrial power tariffs, resulting in 20-25% lower power costs compared to commercial rates in tier-1 metros. Reliability is bolstered by Odisha's power-surplus status.



Innovation and R&D Infrastructure Funding

- Industrial-Tech Integration Grant:** 30% capital subsidy for setting up simulation labs, IoT testbeds, and digital twin platforms that integrate with Odisha's core industrial sectors (steel, minerals, power).
- GreenTech Innovation Voucher:** Grants up to ₹1 Crore for GCCs developing and piloting solutions in renewable energy optimization, circular economy, and climate resilience.
- Patent Incubation Support:** 100% reimbursement of domestic patent filing fees and 75% of international fees for patents filed from an Odisha-based GCC.

Geographic Focus: "The Bhubaneswar-Rourkela Knowledge Corridor"

The strategy focuses on developing a connected corridor between the state's two major knowledge centers:

- Primary Node - Bhubaneswar:** The capital and established IT hub with Infovalley and Infocity Phase II.
- Secondary Node - Rourkela:** Leveraging the presence of NIT Rourkela and proximity to industrial belts for engineering and R&D-focused GCCs.
- Specific Benefits:** Enhanced capital subsidy of 30% in Rourkela, priority in optical fiber connectivity, and subsidized plug-and-play facilities.

Operational and Ecosystem Support

- GoO (Government of Odisha) Catalyst Grant:** Support up to ₹25 lakh for hosting national-level tech conferences, hackathons, or industry roundtables in Bhubaneswar.
- Single-Point Liaison:** A dedicated officer from Odisha Computer Application Centre (OCAC) acts as the facilitator for all state-level approvals and clearances.

Operational Support Infrastructure

01 Single Window Portal - GO-SWIFT (Go Online-Single Window for Instant Facilitation & Transparency)

A unified portal for all business approvals, targeting 15-day clearances for IT/GCC projects. Features online application tracking and integration with 20+ departments.

02 Dedicated GCC/IT Facilitation Cell

A specialized cell under the Electronics & IT Department provides end-to-end support, from land allocation to utility connections and post-establishment grievance redressal.

03 Premier Academic and Research Integration

- IIT Bhubaneswar & NIT Rourkela Synergy:** Direct partnerships for sponsored research, curriculum co-design, and faculty consultancy programs.
- KIIT & SOA University Linkage:** Access to a large, multidisciplinary student base for talent and collaborative projects in emerging tech.

04 Talent Pipeline: "The Stable, High-Quality Reservoir"

- Educational Depth:** Home to 100+ engineering colleges, including premier institutes like IIT Bhubaneswar, NIT Rourkela, and large private universities like KIIT. Produces over 40,000 technical graduates annually.
- Skilling Initiatives:** Odisha Skill Development Authority (OSDA) runs specialized programs in IT/ITeS, industry 4.0, and digital skills, with active participation from industry councils.

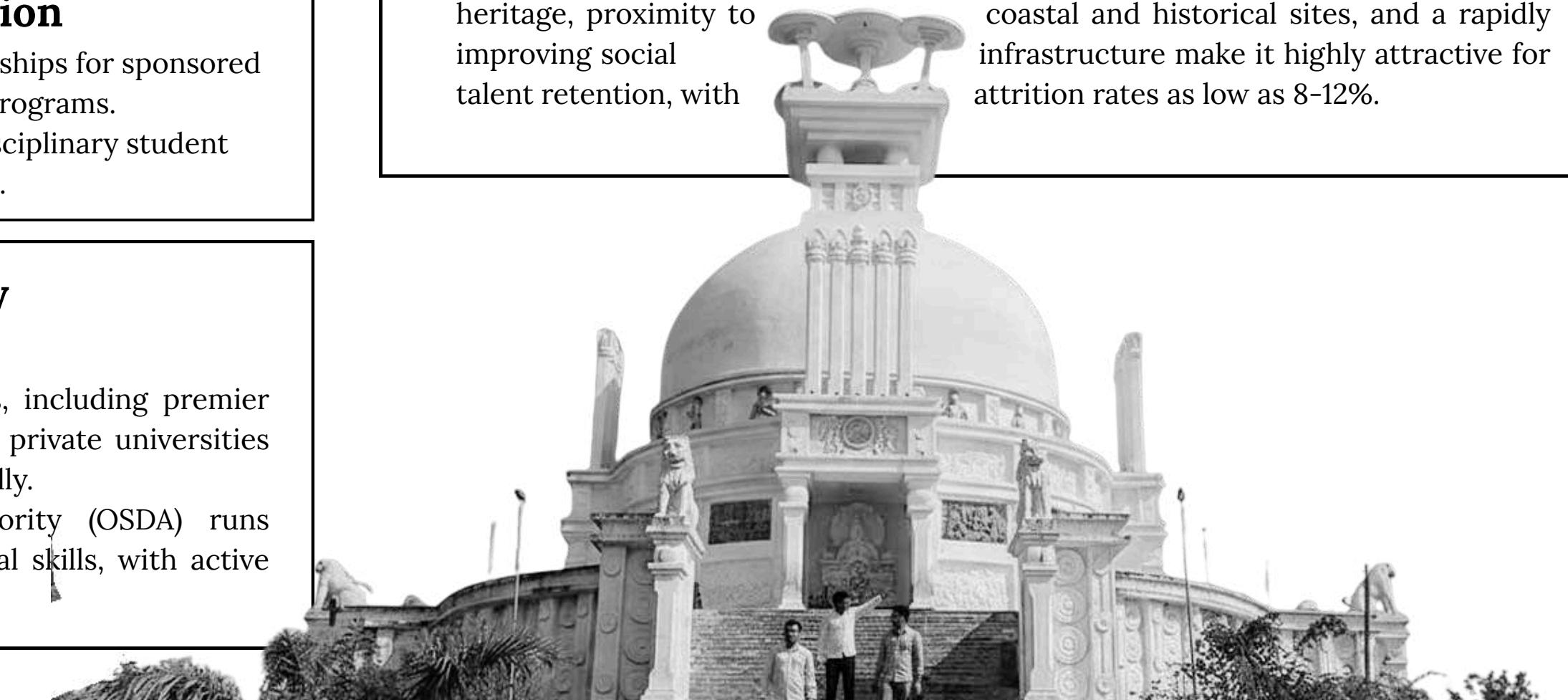
05

Infrastructure Readiness: The Planned Smart Capital

- Digital Infrastructure:** State-wide O-Fibre Net project ensuring high-speed broadband. Bhubaneswar is a 5G-ready city with robust digital infrastructure.
- Physical Infrastructure:**

- Transport:** Well-planned road network with minimal traffic congestion compared to metros. Biju Expressway connects major economic nodes. Bhubaneswar Metro (feasibility stage).
- Air Connectivity:** Biju Patnaik International Airport with direct connectivity to major Indian metros and key international gateways like Dubai and Singapore.

Quality of Life: Renowned for cleanliness, safety, and affordability. Rich cultural heritage, proximity to coastal and historical sites, and a rapidly improving social infrastructure make it highly attractive for talent retention, with attrition rates as low as 8-12%.



Assessment Odisha's

Strategic Advantages and Constraints

Strengths

- Unbeatable Cost Economics:** 30-40% lower operational costs than Bengaluru/Hyderabad, encompassing real estate, salaries, and utilities. The most cost-competitive emerging hub.
- High Talent Stability & Loyalty:** Exceptionally low attrition rates due to strong local roots, high quality of life, and fewer competing employers, leading to better ROI on training.
- Proactive & Accessible Government:** The "5T" governance model ensures rapid decision-making and a problem-solving approach. Senior government officials are highly accessible.
- Niche in Industrial & Green Tech:** Unique positioning to serve GCCs focused on metals, mining, heavy engineering, and sustainability, leveraging the state's core economy.
- Quality of Life Advantage:** A clean, spacious, and culturally rich capital city with minimal commute stress, offering a superior work-life balance.

Challenges

- Nascent GCC Ecosystem:** Very small base of existing GCCs, leading to limited peer networks, a smaller pool of experienced (5+ years) tech professionals, and a less mature vendor/service provider ecosystem.
- Perception as an Industrial State:** Overcoming the traditional image as a mining/steel state to be seen as a serious destination for high-end technology work.
- Limited International Connectivity:** While improving, direct international flight options are limited compared to tier-1 hubs, requiring connections for global travel.
- Scale of Talent Pool:** While quality is good, the absolute number of experienced tech professionals in the immediate catchment area is smaller than in established hubs, potentially constraining very rapid, large-scale hiring.

Optimal For

- Niche Engineering & Industrial Tech R&D:** GCCs of global mining, metals, and heavy engineering corporations seeking digital innovation labs close to operational assets.
- Cost-Optimized Centers of Excellence:** Strategic units focused on AI/ML, data analytics, cybersecurity, or ERP support where deep ecosystem networks are less critical than cost and talent stability.
- Sustainability & GreenTech Innovation Hubs:** Teams working on ESG tech, carbon accounting, renewable energy software, and climate tech, aligning with the state's green focus.
- Global Business Services & Back-office Operations:** Scalable shared services centers for finance, accounting, HR, and IT support where operational cost is a primary driver.
- Companies seeking a "Lighthouse" Location:** Organizations aiming to establish a first-mover advantage in an emerging, low-cost, government-supported destination with high growth potential.

STATE	TALENT SKILLING	CAPITAL SUBSIDY	GEOGRAPHIC BENEFITS	IP SUPPORT	INFRASTRUCTURE GRANTS	OPERATIONAL SUPPORT	SPECIAL FOCUS
Karnataka	High (KDEM initiatives)	Tier-based %	Rural/North KA focus	R&D/Patent cost reimbursement	Power & water concessions	Stamp duty exemptions	ESDM & Aerospace
Telangana	TASK program	Significant for Mega Projects	Focus on Tier-II cities	Patent registration subsidy	Plug-and-play parks	Quality certification grants	Life Sciences & IT
Maharashtra	Skill Dev training	High (Package of Incentives)	Zone-based (A to D+)	Innovation & R&D hubs	Land at concessional rates	Electricity duty waivers	EV & FinTech
Tamil Nadu	Naan Mudhalvan scheme	Investment-linked	Backward district bonus	Tech transfer support	SIPCOT industrial parks	Payroll incentives	EVs & Green Energy
Delhi-NCR	Tech-focused training	Limited (State-specific)	SEZ/Industrial clusters	Start-up seed funding	Common Facility Centers	Interest subvention	Services & Logistics
Gujarat	Industry-aligned	Robust (GIDC model)	Dholera SIR benefits	IP protection grants	Connectivity & Logistics	Fixed power tariffs	Semiconductors & Textiles
Odisha	Skilled-in-Odisha	Capex-heavy support	Focus on Western/Southern districts	R&D center assistance	Plug-and-play labs	Interest subsidy	Metals & ESDM

What is your GCC's Primary Objective?

Deep ecosystem & maximum talent? YES

Karnataka (Bengaluru)

- Top Talent
- Major Tech Hub
- Deep Ecosystem



Delhi-NCR

- Large Pool of Skilled Professionals
- Business & Policy Hub
- Strong Network



15-25% cost saving with quality? YES

Telangana (Hyderabad)

- Tech Talent
- Growing CCC Hub
- Cost Efficient



Maharashtra (Pune)

- IT & Analytics Hub
- High Quality
- Moderate Costs



Manufacturing/industrial integration? YES

Tamil Nadu (Chennai)

- Industrial Expertise
- Automotive & Manufacturing
- Strong Infrastructure



Ultra cost (30%+) savings & stability? YES

Odisha (Bhubaneswar)

- Ultra Low Costs
- Niche Industries
- Sustainable Focus



Gujarat (Ahmedabad)

- 30%+ Cost Savings
- Industrial Growth
- Stable Environment



Strategic HQ/leadership location? YES

Delhi-NCR

- Business & Policy Hub
- Central Leadership
- Strong Network



Table 1: Talent Development & Skilling Incentives

STATE	KEY SKILLING PROGRAM(S)	FINANCIAL INCENTIVES FOR TRAINING	SPECIALIZED FOCUS AREAS	UNIQUE INITIATIVES / PARTNERSHIPS
Karnataka	Nipuna Karnataka, KDEM initiatives	20% reimbursement of skilling expenses; 50% internship stipend reimbursement	AI/ML, Cloud, Cybersecurity, Blockchain	MoUs with Microsoft, Intel, IBM, Accenture; Leadership development support
Telangana	T-Skills, TASK Program	60% reimbursement of training costs; ₹10,000/month intern subsidy	AI, Quantum, Blockchain, Cybersecurity	Partnerships with IIT-H, IIIT-H, ISB; Women workforce acceleration (extra 10% incentive)
Maharashtra (Pune)	MSSDC clusters, Industry-Academia Bridges	₹5,000/month grad hire subsidy (24 mos); 25% extra for AI/ML, Cybersecurity training	Advanced Manufacturing, Embedded Systems, EV Tech	Strong integration with COEP, Savitribai Phule Pune University; On-premises corporate training
Tamil Nadu (Chennai)	Naan Mudhalvan, TNSDC programs	₹4,500/month grad hire reimbursement (36 mos); 30% subsidy for advanced engineering training	Robotics, Additive Manufacturing, Composite Materials, ASIC Design	"Centres of Relevance" in IIT Madras, Anna University; Focus on applied engineering
Delhi-NCR	State-specific tech programs, CoE Grants	₹10 Lakh reimbursement for VP+ hires; 30% reimbursement for GenAI, Quantum skills	GenAI, Quantum Computing, RegTech, Digital Regulation	Access to IIT Delhi, ISI, JNU; Executive hire support for global leadership
Gujarat (Gandhinagar)	Gujarat Skill Mission, Academic Sandboxes	₹4,000/month Capital City Retention Grant (36 mos); 50% co-funding for Public Policy Tech roles	GovTech, EdTech, Sustainability Analytics, Legal Tech	Direct partnerships with DA-IICT, PDPU, GNLU; Live project labs in universities
Odisha (Bhubaneswar)	Skilled-in-Odisha, OSDA programs	₹5,000/month GEI (+₹1,000 for women); 40-60% upskilling grant (higher for GreenTech)	Green Tech, Industrial IoT, Mining & Metals Process Automation	Industry-Academia Catalyst Grants; Focus on sustainability and industrial tech

Table 2: Financial & Capital Investment Incentives

STATE	CAPITAL INVESTMENT SUBSIDY	STAMP DUTY/PROPERTY TAX BENEFITS	POWER & UTILITY COST BENEFITS	SPECIAL GRANTS & ADDITIONAL SUPPORT
Karnataka	Up to 25%	Stamp duty exemption; Property tax reimbursement in "Beyond Bengaluru" locations	5-year electricity duty exemption in tier-2/3 cities	Infrastructure grants up to ₹50M; Innovation challenge funding (up to ₹1.5 Cr)
Telangana	30% (Higher for green buildings)	100% stamp duty exemption; Property tax holiday in "Beyond Hyderabad"	Industrial power tariffs; 7-year electricity duty exemption in tier-2 cities	Patent bonus (₹10 Lakh); Tech transfer grant (₹25 Lakh); Event support up to ₹40 Lakh
Maharashtra (Pune)	20% in designated IT parks	100% stamp duty reimbursement in PMRDA areas	Eligibility for industrial power tariffs (~10-15% saving)	Event hosting grant (up to ₹20 Lakh); Cluster development support
Tamil Nadu (Chennai)	15-25% in designated corridors	100% stamp duty exemption in SIPCOT parks/SEZs	Industrial power & water tariffs; Green infrastructure incentive (+5%)	Patent commercialization grant (₹25 Lakh); Shared testing facility subsidy (50%)
Delhi-NCR	15-20% for large campuses in Haryana/UP	100% stamp duty exemption in designated sectors	Industrial tariffs in Noida/Gr. Noida (15-20% saving)	Global HQ Setup Grant (₹2 Cr); RegTech sandbox incentive (₹50 Lakh)
Gujarat (Gandhinagar)	25% in GIFT SEZ & Infocity	100% stamp duty exemption in IT parks	Industrial power/water tariffs (10% below Ahmedabad commercial)	Civic Tech Challenge Fund (₹50 Lakh); GIFT City synergy bonus (+15% subsidy)
Odisha (Bhubaneswar)	25% in IT parks (+5% for net-zero)	100% stamp duty reimbursement; 5-year electricity duty exemption	Industrial tariffs (20-25% lower than metros); Power-surplus state	GreenTech Innovation Voucher (up to ₹1 Cr); GoO Catalyst Grant (up to ₹25 Lakh)

Table 3: Geographic Expansion & Tier-2 City Support

STATE	IP CREATION & PATENT SUPPORT	R&D INFRASTRUCTURE & LAB FUNDING	SPECIAL INNOVATION PROGRAMS	ECOSYSTEM FOR CO-INNOVATION
Karnataka	50% patent filing fee reimbursement	Up to 40% funding for innovation labs	Innovation Challenge Funding (up to ₹1.5 Cr for civic solutions)	Matchmaking for industry-academia; Three planned Global Innovation Districts
Telangana	₹10 Lakh bonus per granted patent	Up to 50% capex subsidy for labs (max ₹5 Cr)	Annual ₹50 Cr Innovation Challenge Fund for civic tech	T-Hub integration; CoEs in Genome Valley, Hardware Park
Maharashtra (Pune)	₹15 Lakh per international patent granted	25% capex subsidy for Auto/Aero test labs & simulation software	State support for shared R&D facilities in Hinjewadi/Talegaon	Linkages with IIT Pune Research Park; Defense & Aerospace synergy
Tamil Nadu (Chennai)	₹25 Lakh for commercialized patents (+50% if produced in TN)	25% subsidy for Industry 4.0 labs (digital twin, prototyping)	Grants for applied engineering labs within university campuses	IIT Madras Research Park synergy; Defense Corridor access
Delhi-NCR	Seed funding for startups; Grants for R&D labs	25% capex subsidy for AI/ML labs, UX studios	RegTech/Sandbox Innovation Incentive (₹50 Lakh)	Direct regulator access (RBI, SEBI); Partnerships with IIT Delhi, ISI
Gujarat (Gandhinagar)	₹20 Lakh/patent for public good tech (water, energy)	Grants for academic "sandbox" labs (up to ₹2 Cr)	Civic Tech Challenge Fund (₹50 Lakh)	DA-IICT, PDPU, GNLU collaboration; GIFT City regulatory sandbox proximity
Odisha (Bhubaneswar)	100% domestic / 75% int'l patent fee reimbursement	30% capital subsidy for Industrial-Tech integration labs (digital twin, IoT)	GreenTech Innovation Voucher (up to ₹1 Cr)	Partnerships with IIT Bhubaneswar, NIT Rourkela; Focus on mining/metals tech

Table 4: Infrastructure & Operational Readiness

STATE	SINGLE-WINDOW CLEARANCE (TIME)	DEDICATED GCC SPOC/SUPPORT CELL	PHYSICAL INFRASTRUCTURE EDGE	DIGITAL INFRASTRUCTURE & CONNECTIVITY
Karnataka	45 days maximum	Dedicated SPOC per GCC	Three planned Global Innovation Districts; Dedicated GCC parks	5G rollout in business districts; Statewide fiber
Telangana	15 days (TS-iPASS)	GCC Commissioner under IT Secretary	Planned HITEC City expansion; Integrated live-work-play zones	5G across Hyderabad metro; Govt-operated fiber backbone
Maharashtra (Pune)	30-60 days	MIDC officer for large projects	Connectivity to industrial belts; Metro linking Hinjewadi	Robust fiber network; 5G priority city
Tamil Nadu (Chennai)	30-day target	Guidance Tamil Nadu officer	Port & industrial cluster adjacency; Smart city initiatives	Submarine cable landing station; Extensive fiber
Delhi-NCR	48-hour expedited channel	Tripartite committee (Invest India, HSIIDC, Noida Auth.)	World-class airport & largest metro network; Expressways	Largest internet exchange (NIXI); 5G leader
Gujarat (Gandhinagar)	20-day target	Joint cell (GIFT City & GIDC)	Planned capital city; Low congestion; Reliable utilities	GSWAN backbone; Seamless fiber integration with GIFT City
Odisha (Bhubaneswar)	15-day target	Dedicated cell under Electronics & IT Dept	"Smart City" with minimal traffic; Power-surplus state	O-Fibre Net project; 5G-ready city

Table 5: Strategic Positioning & Optimal GCC Profile

STATE	CORE SECTORAL STRENGTHS	ATTRITION RATE (EST.)	COST ADVANTAGE (VS. BENGALURU)	OPTIMAL FOR
Karnataka	BFSI, Retail/CPG, Healthcare, Software, ESDM, Aerospace	18-22% (High)	0% (Benchmark)	Large-scale, innovation-driven R&D; Multi-functional HQs; Companies needing deepest ecosystem.
Telangana	Technology/Hyperscalers, BFSI, Life Sciences, Cybersecurity	14-18% (Moderate)	15-20% Lower	Cost-conscious scale ops; Tech/BFSI GCCs; Rapid setup; Emerging tech R&D.
Maharashtra (Pune)	Automotive, Industrial Engg., SaaS, EV, IT Services	12-16% (Mod-Low)	15-25% Lower	Engineering R&D centers; Scalable IT delivery; Hub-and-spoke model spokes.
Tamil Nadu (Chennai)	Automotive, Aerospace, Defense, Heavy Engg., Semiconductors	10-14% (Low)	25-30% Lower	Manufacturing-led R&D; Hardware/Product design; Companies needing supply chain integration.
Delhi-NCR	BFSI/FinTech, Consumer Internet, Global HQs, SaaS, Telecom	15-20% (Mod-High)	10-15% Higher	Global/APAC Headquarters; BFSI powerhouses; Consumer tech; Regulatory affairs-intensive units.
Gujarat (Gandhinagar)	GovTech, RegTech, EdTech, Sustainability, Green Finance	8-12% (Very Low)	15-20% Lower	GovTech/RegTech specialists; Strategic R&D centers; GIFT City support functions; Stability-seekers.
Odisha (Bhubaneswar)	Industrial Tech (Metals/Mining), Green Energy, Sustainability, GovTech	8-12% (Very Low)	30-40% Lower	Niche Industrial/GreenTech R&D; Ultra cost-optimized CoEs; Back-office ops; "Lighthouse" projects.

CONCLUSION

Strategic Imperatives for GCC Site Selection



The comparative analysis of GCC incentives and support across Indian states reveals a market that has matured from a monolithic, cost-driven landscape into a sophisticated, multi-polar ecosystem. The blanket narrative of "India as a back-office destination" has been irrevocably replaced by a complex matrix of specialized hubs, each competing on a differentiated value proposition far beyond fiscal incentives alone.

The Core Strategic Takeaway: Success in the next phase of GCC growth in India will be determined not by finding the lowest cost, but by achieving the optimal strategic fit. The variance in policy frameworks, infrastructure readiness, talent ecosystems, and sectoral strengths means that the "best" location is entirely contingent on a GCC's specific operational model, strategic mandate, and growth trajectory.

Key Decision-Matrices Emerging from the Analysis

The Maturity-Cost Trade-off: A clear continuum exists from mature, ecosystem-rich but high-cost hubs (Karnataka, Delhi-NCR) to emerging, ultra-cost-competitive but nascent destinations (Odisha, parts of Gujarat).

Karnataka and Delhi-NCR offer irreplaceable depth for innovation-driven R&D and global leadership seats, but at a premium. Telangana and Maharashtra strike a compelling middle balance, offering robust ecosystems with meaningful cost advantages. Tamil Nadu provides specialized, cost-effective depth for engineering-heavy sectors. The emerging hubs of Gujarat and Odisha present the highest cost arbitrage for stable, niche operations but require a higher tolerance for ecosystem building.

- **Sectoral Specialization as a North Star:** States have deliberately cultivated sectoral adjacencies. Site selection must align with these inherent strengths:

- **Engineering & Manufacturing R&D:** Tamil Nadu (automotive, aerospace) and Pune (auto, industrial) are dominant.
- **BFSI & FinTech:** Delhi-NCR (leadership, regulation) and Karnataka (breadth, innovation) lead, with Telangana as a strong challenger.
- **Technology/Hyperscaler & Life Sciences:** Telangana has a distinct edge, with Karnataka maintaining a strong presence.
- **Consumer Tech & Global HQs:** Delhi-NCR is unparalleled for leadership access and scale.
- **GovTech, Sustainability, & Niche R&D:** Gujarat and Odisha offer unique, policy-adjacent environments with high stability.

- **The Scale vs. Specialization Dilemma:** For GCCs requiring rapid hiring of 500+ employees, the talent pool depth of Karnataka, Delhi-NCR, and Telangana remains critical. However, for focused Centers of Excellence (CoEs), micro-GCCs, or specialized R&D pods, the high-quality, stable talent from tier-2 strategies or emerging hubs (like Gandhinagar or Bhubaneswar) can offer superior retention and lower operational friction.

- **Operational Velocity vs. Institutional Depth:** The speed of setup and regulatory ease, exemplified by Telangana's TS-iPASS, is a powerful lever for time-to-market. However, long-term innovation potential is often fueled by the institutional depth and spontaneous collaboration found in mature clusters like Bengaluru. The choice hinges on whether the immediate priority is operational launch or long-term strategic innovation.

Forward-Looking Considerations

01

The Tier-2 Imperative is Real

All leading states are aggressively incentivizing decentralization. Early movers into designated tier-2 clusters (e.g., Karnataka's "Beyond Bengaluru," Telangana's "Beyond Hyderabad") can lock in superior incentives and first-mover advantage, albeit with the challenge of pioneering the ecosystem.

02

Talent Strategy is the Ultimate Decider

Incentives for capital investment are converging. The decisive differentiator is each state's approach to talent pipeline creation—through deep academic integration (Chennai, Gandhinagar), massive corporate-led skilling (Telangana's T-Skills, Karnataka's Nipuna), or premium graduate output (Pune, Delhi-NCR). The alignment of a state's skilling focus with a GCC's skill needs is paramount.

03

Sustainability and ESG as Emerging Filters

States like Odisha (green tech), Gujarat (GIFT City synergy), and Tamil Nadu (green energy focus) are weaving sustainability into their value proposition. For GCCs with strong ESG mandates or operating in green finance, this alignment will grow in importance.

03

The Evolving Role of GCCs

As GCCs evolve into global innovation networks, states that support co-creation with startups, academia, and the public sector (through innovation challenges and shared labs) will attract the highest-value mandates.

Final Recommendation

Corporate strategists must treat GCC site selection as a multidisciplinary exercise, integrating:

01



Financial Analysis

Modeling total cost of ownership over a 5-7 year horizon, including incentives, salaries, real estate, and attrition costs.

02



Talent Mapping

Auditing the availability and future pipeline of both niche technical skills and leadership talent.

03



Strategic Alignment

Ensuring the state's sectoral focus, infrastructure trajectory, and governance style align with the GCC's long-term mission.

04



Risk Assessment

Evaluating concentration risk, infrastructure saturation, and geopolitical stability.

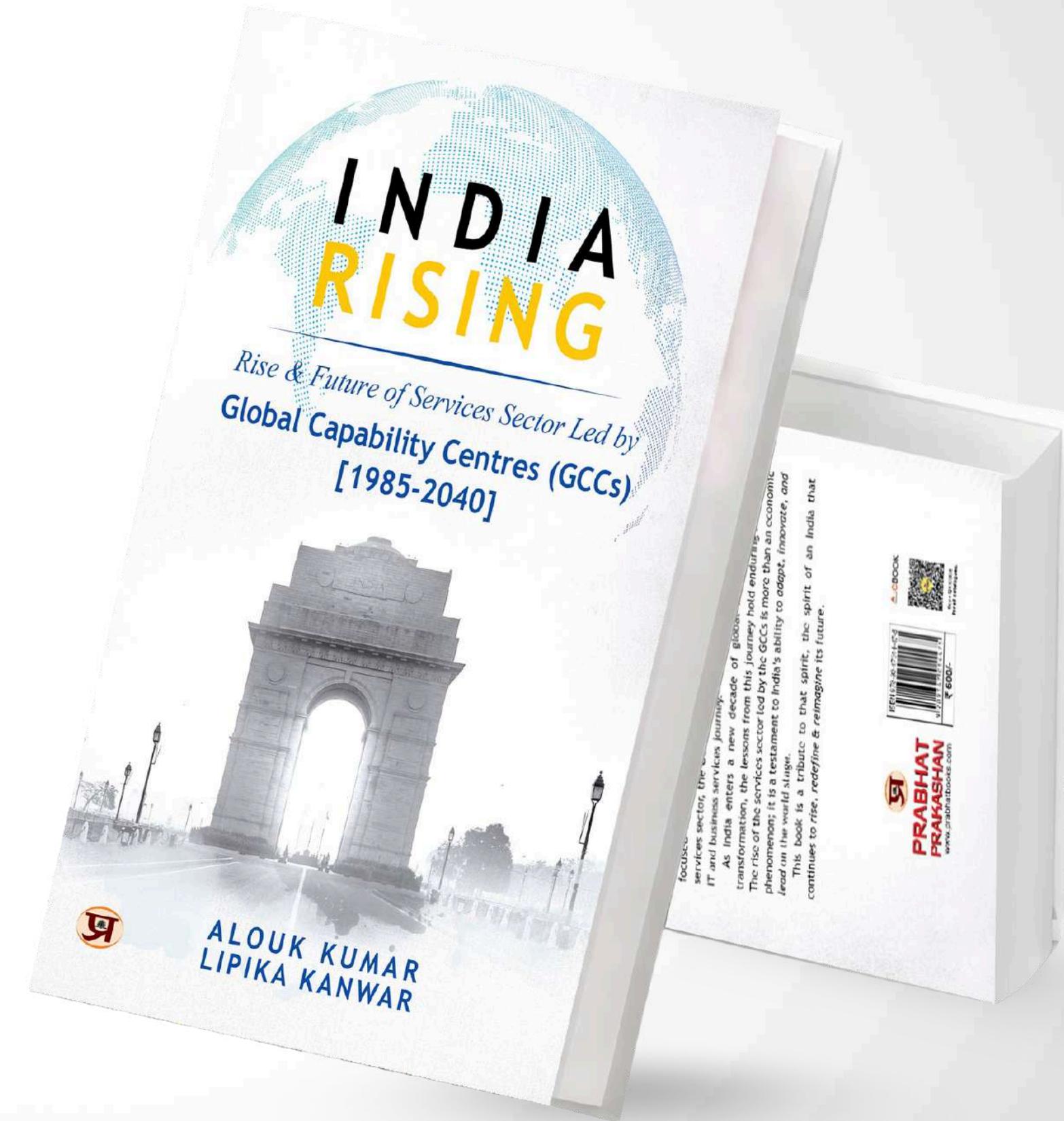
The competition among Indian states has created a buyer's market for multinational corporations, offering unprecedented choice and leverage. The winners will be those who move beyond a transactional incentive negotiation to forge a strategic partnership with a state whose aspirations and capabilities are in symbiotic alignment with their own global ambitions. The choice is no longer just about where to place a GCC, but about selecting the right innovation partner for the next decade.

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This hybrid approach optimizes costs, mitigates risks, and accelerates GCC growth, ensuring innovation-driven operations with minimal liabilities and maximum efficiency.



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